



Work Instruction (WI)

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TITLE: Chief, Information and Logistics Management
Division

COMPLIANCE IS MANDATORY

Responsible Office: 270/Information and Logistics Management Division

Title: Equipment Management

PREFACE

P.1 PURPOSE

This procedure establishes the processes for management and responsibility of Government-owned equipment located at the Goddard Space Flight Center (GSFC) Greenbelt MD and Wallops VA, the Goddard Institute for Space Studies (GISS) NY, the Independent Verification and Validation (IV&V) Facility WV, the White Sands Complex (WSC) NM and NASA Headquarters Washington DC. Government-owned equipment is a tangible asset that is functionally complete for its intended purpose, durable, has a useful life of two (2) years or more and will not be consumed or expended in an experiment.

P.2 APPLICABILITY

This procedure applies to all Government and contractor organizational elements of the Information and Logistics Management Division.

P.3 REFERENCES

270-WI-4300.0.1 Excess Property Management

270-WI-6400.1.3K Project Storage Program

Federal Acquisition Regulation (FAR)

Federal Acquisition Regulation Supplement

Federal Cataloging Handbook H2

Federal Management Regulation (FMR)

H-6, Defense Logistics Service Center, Cataloging Handbook

NPD 4200.1C – NASA Equipment Management

NPR 4200.1G - NASA Equipment Management Manual Procedural Requirements

NPR 4300.1 – NASA Personal Property Disposal Manual

NPR 9250.1 Property, Plant and Equipment and Operating Material and Supplies

NPD 1141.6 NASA Records Management

NPR1441.1 NASA Records Retention Schedules

GSFC-05-equipment@mail.nasa.gov

GSFC-05-disposal@mail.nasa.gov

<https://gs279sims.gsfc.nasa.gov/sims/login>

P.4 CANCELLATION

270-WI-4200.0.1

P.5 TOOLS, EQUIPMENT, AND MATERIALS

None

P.6 SAFETY PRECAUTIONS AND WARNINGS

None

P.7 TRAINING

The Equipment Management personnel are required to take the following training courses:

- Business Objects Analysis (BOBJ) – SATERN Web Base or Instructor Lead
- Systems, Applications, and Products (SAP) – SATERN Web Base or Instructor Lead

P.8 RECORDS

AFS	RECORD TITLE	RECORD CUSTODIAN	CS OR CNT	FILE LOCATION	RETENTION
4210	ECN Tag Register – NASA Bar Code Tag Log & Voided Tag Sheets	Code 279 - Equipment Control	CNT	B26, Room S250	NRRS 4/8
4210	External Loan Agreement Files, <u>NASA Form 893</u>	Code 279 - Equipment Control	CNT	B26, Room S250	NRRS 4/8B Destroy 6 years after the end of the fiscal year in which the property was returned.
4210	Equipment Inventory Files	Code 273 - Supply & Equipment Management Branch	CS	B26, Room N250	NRRS 4/8

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4100	Capital Equipment Register and Files	Code 279 – Equipment Control	CNT	B26, S250	Room	NRRS 4/4 Destroy on Discontinuance of Installation
4100	Capitalization Determination Form, <u>NF 1739</u>	Code 279 - Equipment Control	CNT	B26, S250	Room	NRRS 4/4 Destroy on Discontinuance of Installation
4100	Control/Capitalization of Locally Fabricated Equipment, <u>GSFC 20-68</u>	Code 279 - Equipment Control	CNT	B26, S250	Room	NRRS 4/4 Destroy on Discontinuance of Installation
4020	Survey Register and Reports, <u>NASA Form 598</u>	Code 273 – Supply & Equipment Mgmt. Branch	CS	B26, N250	Room	NRRS 4/2 Destroy 2 years from date of survey action
4020	Survey Report Supplement, <u>GSFC 20-79</u>	Code 273 – Supply & Equipment Mgmt. Branch	CS	B26, N250	Room	NRRS 4/2 Destroy 2 years from date of survey action
	DOD Industrial Plant Equipment Requisition Form, <u>1419</u>	Code 279- Equipment Control	CNT	B26, S250	Room	
4370	Cannibalization/Modification, <u>NASA Form 1617</u>	Code 279 – Equipment Control	CNT	B26, S250	Room	NRRS 4/11 Permanent pending retention approval
4210	Shipping Documents, <u>GSFC 20-4</u>	Code 279 – Equipment Control	CNT	B26, S250	Room	Convert to CD-ROM 18 months after cutoff date. Destroy hardcopy after CD-ROM conversion is verified and when hardcopy of 3 years old.

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4210	Scanned Electronic Copies of Equipment Records: Adds, Updates, & Deletions: Purchase Orders; Found on Station (FOS), <u>NF 1618</u>	Code 279 - Equipment Control	CNT	B26, S250	Room	NRRS 4/8.4 Destroy/Delete after the recordkeeping copy has been produced (scanned)
4210	Property Pass Request and Removal Permit, <u>NF 892</u>	Code 279 - Equipment Control	CNT	B26, S250	Room	Destroy 3 months after expiration or revocation
	Clearance Record Form	Code 273 – Supply & Equipment Mgmt. Branch	CS	B26, N250	Room	

* NRRS – NASA Records Retention Schedule (NPR 1441.1)

P.9 METRICS

GLTI, Performance Requirement Summary (PRS)

	SOW Section	Required Service	Standard
9.	6.1.	Tagging Equipment (Greenbelt, Wallops and NASA HQ)	Equipment shall be tagged and data accurately entered within 8 workdays from receipt of the Tag-In-Division tagging request, document or telephone call from the customer. Capital equipment shall be tagged and entered within 20 workdays. (100%)
10.	6.1.	Equipment Management System Database (Greenbelt, Wallops and NASA HQ)	Data entry into the equipment database shall be accurately completed within 4 workdays from receipt of the request or source document. (100%)

INSTRUCTIONS

In this document, a requirement is identified by “shall,” a good practice by “should,” permission by “may” or “can,” expectation by “will and descriptive material by “is.”

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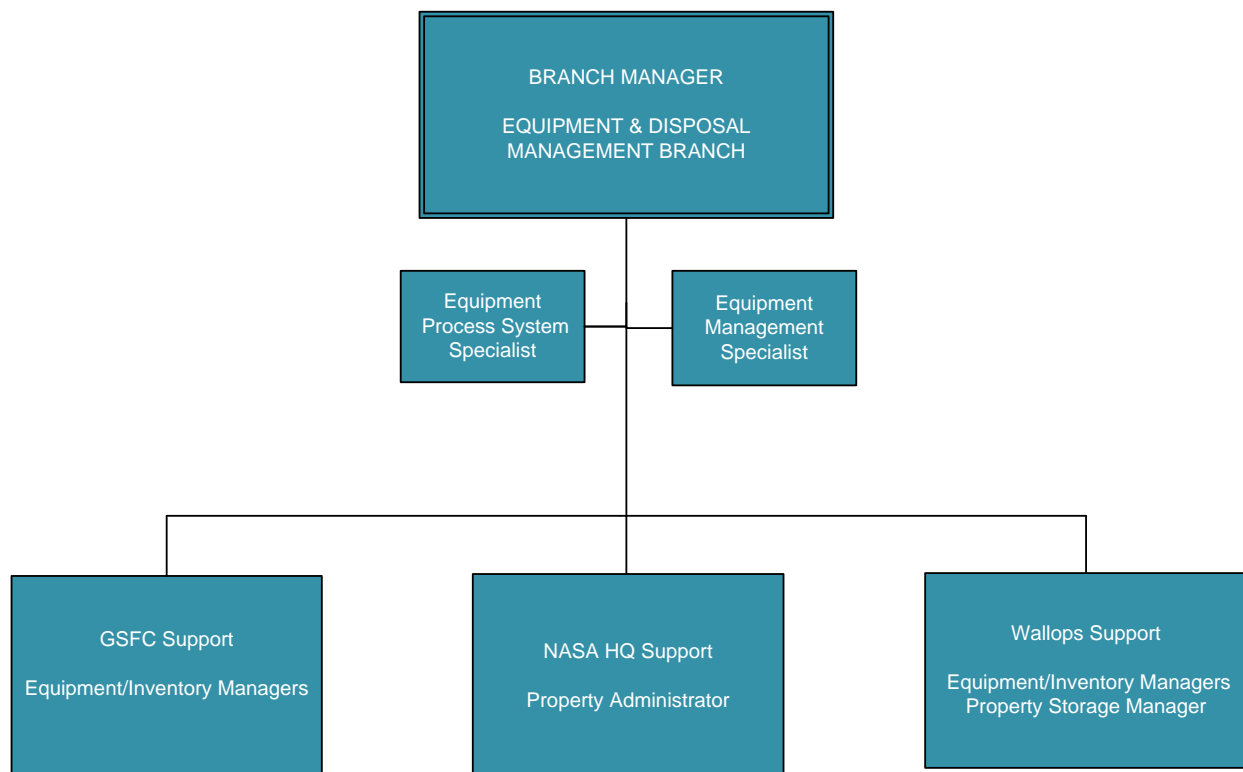
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CHAPTER 1. GENERAL INFORMATION

This Work Instruction (WI) describes operations involved in acquisition, documentation, utilization, maintenance, and inventory control of Government-owned equipment at the Goddard Space Flight Center (GSFC), including the Wallops Island Facility (WFF), the White Sands Complex (WSC), the Goddard Institute for Space Studies (GISS), the Independent Verification and Validation (IV&V) Facility and NASA Headquarters as directed by the Code 273 Supply & Equipment Management Branch. Government equipment is to be used exclusively for the conduct of official business. Therefore, appropriate accountability measures shall be used to track and move equipment.

The management of GSFC and NASA HQ Government-owned equipment is accomplished principally by the use of the NASA Integrated Asset Management (IAM) Property, Plant, & Equipment (PP&E) System. The logistics support contractor's technical performance is measured through the use of Deliverable Reports and Performance Based Metrics that are specific in the Goddard Logistics and Technical Information Contract.



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CHAPTER 2. RESPONSIBILITIES

2.1 Division Chief. Division chiefs are the principal official responsible for the NASA Equipment Management Program for all equipment, controlled and administratively controlled, assigned to the organization, including all aspects of its use and condition. Responsibilities include the following:

- 2.1.1** Appointing (or reappointing) property custodians using the “Appointment Letter Template” to maintain accountability of equipment within their level of the organization, and ensuring that the appointees shall have proper oversight and knowledge of the equipment utilized within their area. When the appointed property custodian is a contractor employee, the program manager for that contract shall complete the appointment letter.
- 2.1.2** Ensuring that property custodians are provided with the necessary computer hardware/software for network access and electronic systems
- 2.1.3** Conducting annual equipment utilization walk through inspections and completing the Annual Property Walk-Through Form, Attachment 11
- 2.1.4** Ensuring that employees are aware of their responsibilities as users of Government property and they coordinate all equipment actions with the property custodian
- 2.1.5** Ensuring that equipment removed from the Center is in full compliance with the Center policies and procedures
- 2.1.6** Ensuring that all equipment loans are documented and tracked and are essential to accomplish assigned projects
- 2.1.7** Ensuring that all found-on-station equipment and requests for cannibalization have been properly investigated and documented by the holding organization prior to forwarding to the Equipment Management Team, Code 273 for review and SEMO approval
- 2.1.8** Ensuring that all missing equipment items are properly investigated and documented; include actions to prevent recurrences; take corrective actions as recommended by the Property Survey Officer or Board
- 2.1.9** Ensuring that procedures are in place for equipment received through direct deliveries; regardless of the acquisition method (to include credit card purchases), that equipment is properly controlled and tagged
- 2.1.10** Assuming responsibility and accountability for any controlled property not assigned to a specific active user within their area of responsibility
- 2.1.11** Exercising appropriate oversight for capital equipment (\$500,000 or greater), to ensure all movement of these items are properly documented and equipment users understand the

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importance of asset accountability and how capital equipment affects the Center's financial records; approves all excessing, transfers, and external loans of capital equipment items

2.2 Directorate Liaison. The directorate liaison is a designee from the directorate to serve as a liaison between the Supply & Equipment Management Branch and the directorate. An appointment letter template can be located on the Code 273 Homepage. Responsibilities include the following:

- 2.2.1** Keeping directorate senior management advised of directorate property accountability activities
- 2.2.2** Assisting all directorate property custodians on unresolved property accountability issues, such as obtaining required support from their equipment users or gathering information for the Center's senior management or Code 273
- 2.2.3** Assisting the Supply & Equipment Management Branch, Code 273 personnel on property accountability issues such as: data calls for property audits, NASA Headquarters, Government Accounting Office (GAO) or Inspector General (IG) Review/Investigation; inventory timeliness; equipment losses; incomplete supporting documentation and inactive property accounts
- 2.2.4** Stressing the importance of property accountability (including administratively controlled equipment) with special emphasis placed on the handling of capital equipment items
- 2.2.5** Signing off on equipment validations (emails) for items located after the Inventory Reconciliation is completed by the Inventory Team, Code 279
- 2.2.6** Reviewing and initialing all Report of Surveys for their directorate prior to submitting to the Supply & Equipment Management Branch for processing
- 2.2.7** Ensuring each division in the directorate develops internal procedures to manage administratively controlled equipment

2.3 Supply and Equipment Management Officer (SEMO) The SEMO, or designee, is responsible for providing functional management and leadership in the implementation of an effective equipment management program. Responsibilities of the SEMO include the following:

- 2.3.1** Providing adequate Center user and property custodian training on Property Awareness, with special emphasis on accountability, capital equipment and the consequences of poor stewardship and negligent use of all Center assets
- 2.3.2** Appointing an Equipment Manager

- 2.3.3** Ensuring that equipment personnel are performing assigned property functions by prescribing appropriate procedures for user management of equipment that is consistent with the provisions of this WI
- 2.3.4** Ensuring division chiefs report to the SEMO, user concerns and relevant property issues, including the results of any walk through inspections, the designation of property management areas and property custodian assignments
- 2.3.5** Ensuring that all equipment loans, including those that support special programs, are properly administered
- 2.3.6** Ensuring that all qualified personal property purchased and processed through central receiving are properly controlled and tagged upon official receipt, regardless of procurement method; The SEMO shall establish procedures to ensure that items, which cannot be opened at the central receiving without voiding the warranty, are properly tagged upon opening at the point of destination
- 2.3.7** Ensuring that organizations and users are aware of the requirement to identify inactive equipment and ensure its reuse or disposal, as appropriate
- 2.3.8** Coordinating the appointment of the Property Survey Officer and Property Survey Board and providing a list of their duties (See Section 5.8.3)
- 2.3.9** Ensure compliance with the procedures regarding the loss, damage, destruction, or theft of Center-held Government property and ensure that the functions of the Property Survey Board are being administered
- 2.3.10** Implement the necessary equipment control procedures to ensure that the Center equipment management processes and procedures adequately provide for the care, management, and protection of Center-held equipment
- 2.3.11** Provide for the establishment, operation, and maintenance of the NASA PP&E System; appoint a Center Equipment Manager; and approve and periodically evaluate the NASA PP&E System implementation of policies and procedures by reviewing the following:
 - (a) Maintenance control procedures established for the NASA PP&E System at GSFC
 - (b) Items designated for control as sensitive equipment
 - (c) Controls established and maintained for sensitive items of equipment
 - (d) Records of controlled equipment actions of the Center and its contractors with respect to the NASA PP&E System updates
 - (e) Property management areas and property custodian assignments and training

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(f) Inventory documentation, follow-up actions, and results

- 2.3.12** Designate, in writing, the Center inventory team and inventory process
- 2.3.13** Ensure that prescribed physical inventories of controlled equipment are taken and adjustments to property records are accomplished and coordinated in accordance with NPR 4200.1
- 2.3.14** Ensure that physical inventories are conducted when a new property custodian is assigned and direct special inventories, as appropriate
- 2.3.15** Assist the Center Finance Property Accountant, as needed, during periodic financial analyses
- 2.3.16** Actively enforce the Center's policy concerning the disposition of property
- 2.3.17** Identify equipment at the Center, which shall be controlled as sensitive equipment in addition to the items listed in Equipment Meeting Tagging Criteria, Attachment 2
- 2.3.18** Ensure that whenever there is a transfer of assets from one entity to another, the receiver shall retain the asset classification (Federal Supply Class) as designated by the losing entity. Any reclassification shall be approved by the SEMO and recorded in the NASA PP&E System, (after the transfer is initially recorded)
- 2.3.19** Designate and monitor Center receiving zones to properly track incoming equipment
- 2.3.20** Provide equipment losses survey summary reports and other statistical data to NASA Headquarters LMD in accordance with NPR 4200.1

2.4 Property Custodians. Property custodians are appointed using the Appointment Letter template by the division chief level or higher, with the concurrence of the SEMO. Responsibilities include the following:

- 2.4.1** Maintaining records in accordance with PP&E procedures and for all controlled equipment assigned to them (See Chapter 3)
- 2.4.2** Maintain records in assigned property accounts in accordance with equipment control procedures via EQUIPMENT (location, custodian account and end user changes; validate end user changes; request tags for untagged equipment, transfer property to another property custodian, declare controlled and administratively controlled equipment as excess, process property pass)
- 2.4.3** Educating employees that equipment is used for official purposes only
- 2.4.4** Stressing the importance of property accountability, with special emphasis placed on the handling of capital equipment items

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- 2.4.5 Reporting un-tagged equipment including fabricated equipment found in their assigned area(s) to Equipment Control and provide assistance in identifying the circumstances relating to the un-tagged items
- 2.4.6 Notifying Equipment Control upon receipt of direct deliveries of equipment when the item could not be tagged in Receiving and was flagged as “Tag In Division”
- 2.4.7 Ensuring that proper documentation is completed for cannibalization requests
- 2.4.8 Participating in physical inventories of controlled equipment by knowing the correct location of all equipment items prior to the date of the inventory scanning and assisting in the inventory reconciliation and any associated follow-up actions
- 2.4.9 Identifying controlled and administratively controlled equipment no longer needed and coordinating disposition with users
- 2.4.10 Ensuring any on-site Government-owned property that is excess is turned into the GSFC Property Disposal Officer when no longer required
- 2.4.11 Ensuring that missing equipment is searched for, documented and reported promptly to the Supply & Equipment Management Branch, Code 273, through their directorate liaison; suspected theft shall be reported to the Security Office, Code 240 immediately; ensure the Security Incident Report is attached to the Report of Survey, NF 598 along with the Survey Report Supplement, GSFC 20-79
- 2.4.12 Assigning all equipment items (controlled and administratively controlled) to a primary user
- 2.4.13 Ensuring prior to retirement, transfer, or resignation of an employee, all equipment is properly re-assigned and the employee physically checks out with the Supply & Equipment Management Branch, Code 273
- 2.4.14 Accompanying division chief during annual walk-through inspections
- 2.4.15 Promoting and approving the reutilization of excess property within their organization
- 2.4.16 Assisting equipment users in the proper procedures and documentation of the following controlled and administratively controlled equipment actions: loans, transfers, employee loan agreements, excess actions, repairs, storage, calibration, replacement, modification/cannibalization, fabrication, found on station, and survey reports for lost, damaged, or destroyed equipment, and special emphasis placed on the movement of capital equipment items

2.5 Equipment Manager located in the Supply & Equipment Management Branch, Code 273 is the key interface between the equipment organization, the directorate liaisons, the property custodians

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and equipment users. Primary responsibilities regarding directorate liaisons, property custodians and equipment users are as follows:

- 2.5.1** Ensuring open communication with the directorate liaisons
- 2.5.2** Ensuring the designation of property management areas and that property custodians are appointed and trained via one-on-one training, including the use of the Equipment System, the annual Pre-Inventory Briefing and the Property Awareness Training. Special emphasis is placed on the movement, transfer, and excessing of capital equipment items, which affect the Center's financial records and the general ledger, the inventory process, and new NASA policies
- 2.5.3** Serves as the PP&E System Administrator for PP&E (Plant Maintenance module and EQUIPMENT) (See 3.4.2 for detailed duties)
- 2.5.4** Providing assistance to property custodians and equipment users such as analyzing and providing solutions to problem issues related to property matters
- 2.5.5** Reviewing the records and performance of property custodians
- 2.5.6** Monitoring the progress of the equipment inventory to ensure a quality inventory, all reconciliation issues are resolved, and a thorough search was conducted for missing items prior to accepting a Report of Survey
- 2.5.7** Assisting Equipment Control in conducting the Pre-Inventory Briefings to the property custodians
- 2.5.8** Assist the Industrial Property Office (IPO) in reviewing all shipper/transfer documents prior to shipment to determine if property should be transferred as Government Furnished Equipment (GFE) under the terms of a contract to contractors located off-site
- 2.5.9** Ensuring that shipping documents supporting shipments going to a contractor off site or being returned to the Center from an off-site contractor are forwarded to Equipment Control for processing

2.6 Equipment Control is located in the logistics contract, Information and Logistics Management Division, Code 270. The contractor's primary responsibilities include the following:

- 2.6.1** Maintaining the PP&E equipment database, processing add and change transactions as appropriate
- 2.6.2** Ensuring that all documentation such as loans, transfers, borrows, excess, repairs, storage, replacements, modifications or cannibalizations, fabrications, found on stations and survey reports, submitted by the property custodian or equipment user, is complete and accurate

and contains proper signatures prior to updating the Equipment Management Record (EMR)

- 2.6.3** Investigating all requests for found-on-station reports, cannibalization actions, and decontrolling of equipment, and acquiring approval of the SEMO prior to input action
- 2.6.4** Scheduling and conducting Pre-Inventory Briefings with special emphasis on new NASA policy and improving the Center-wide equipment inventory processes
- 2.6.5** Scanning equipment items in accordance with the approved inventory schedule and complete inventory reconciliation for all items not scanned
- 2.6.6** Documenting inventory results for submittal by the SEMO to division chiefs and property custodians
- 2.6.7** Assisting property custodians and equipment users in all aspects of equipment accountability, with special emphasis placed on the policy and procedures governing capital equipment items and responding to all questions/actions received in the GSFC Equipment-05 Email Box: **GSFC-05-equipment@mail.nasa.gov**
- 2.6.8** Assisting in the annual property custodian training, hands-on computer training of the property systems, and special training sessions as needed
- 2.6.9** Ensuring all supporting documentation is maintained via electronic storage

2.7 Equipment User. An employee has a responsibility as the user of Government property, to protect and conserve all equipment, supplies, and other property and materials entrusted to them. It is the user's responsibility to follow all rules and regulations associated with the property in their control. Additional responsibilities of the individual include the following:

- 2.7.1** Acknowledging receipt of newly assigned equipment (Users are NOT authorized to delegate their acceptance of property; they must accept their property themselves
 - (a) Users will receive an email to notify them of any new equipment assigned to them and shall accept or reject the assignment
 - (b) To accept, users will need to acknowledge receipt by one of the following methods:
 - (1) Accepting responsibility in EQUIPMENT (Actions Tab on Home Page, then Accept or Reject button or icon); or
 - (2) Printing out the accept/reject notification, signing it, and returning a signed copy to the property custodian; or

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(3) Signing a User's Acceptance Form and returning a signed copy to the property custodian

2.7.2 Updating new locations of assigned items via EQUIPMENT

2.7.3 Notifying the property custodian of all activity/movement associated with the assigned user's equipment, especially the movement of capital equipment items

2.7.4 Notifying the property custodian, supervisor, and the Center Security Officer, Code 240, immediately if theft of Government property is suspected and prepare Part I of a Survey Report, NASA Form 598 for lost, damaged, destroyed, or stolen Government property and the Survey Report Supplement, GSFC Form 20-79

2.7.5 Ensuring that equipment is used only in pursuit of approved NASA programs and projects

2.7.6 Notifying the property custodian of equipment not actively being used for determination of proper disposition

2.7.7 Ensuring that prior to retirement, transfer, or resignation, all equipment is properly re-assigned and the government employee physically checks out with the Supply & Equipment Management Branch, Code 273 completing the Clearance Record Form, GSFC 17-26

2.7.8 Retain stewardship of all items (controlled and administratively controlled) assigned to him or her and ensure that the property custodian assigns a new user when they are no longer the primary user

2.8 On-site Contractors. On-site contractors operating under NASA Federal Acquisition Regulation Supplement 1852.245-71, Installation Accountable Government Property to the extent indicated in the clause is responsible as set forth in the individual contracts. The transfer of Government Furnished Equipment (GFE) to a contractor or grantee is explained in Chapter 5, Section 5.6.3.

2.8.1 The contractor shall have written procedures as required by NASA FAR Supplement 1852.245-71.

2.8.2 The contractors' personnel shall notify the cognizant property custodian, their supervisor, and the Installation Security Office immediately if theft of Government property is suspected.

2.8.3 The contractor shall ensure that such equipment is used only in pursuit of approved NASA programs and projects.

2.8.4 The contractors' personnel shall identify equipment not being actively used pursuant of approved NASA programs and projects.

- 2.8.5** Contractors have no authority to loan property and are only permitted to use property for the performance of their contracts.
- 2.8.6** The assigned property custodian shall ensure that any equipment that is in excess is turned into the GSFC Property Disposal Officer when no longer required. This shall only be accomplished for on-site property and it is the only acceptable procedure for disposal of installation-accountable government property.
- 2.8.7** Removal of government-owned property off-site by on-site contractor employees must be documented via a GSFC 20-4, shipping document, and approved by the Contracting Officer & property custodian (See Chapter 5 for more information on contractor employee equipment loans).
- 2.8.8** The contractor shall ensure employees turn in their equipment items assigned to them to their property custodian prior to leaving the Center.

CHAPTER 3: NASA PROPERTY, PLANT, & EQUIPMENT (PP&E) SYSTEM

3.1 BACKGROUND

The Integrated Asset Management (IAM), Property, Plant, and Equipment (PP&E) System, herein referred to as the PP&E System is used throughout the Agency to identify, control, and account for Government-owned equipment acquired by or in use by NASA and its on-site NASA contractors under the NASA FAR Supplement (NFS) clause 1852.245-71 (Installation Accountable Government Property).

3.2 DESCRIPTION

The NASA PP&E System is a standard, Agency-wide automated tool hosted at the NASA Enterprise Applications Competency Center (NEACC) at NASA's Marshall Space Flight Center and was designed to simplify, standardize, and reduce the cost of managing and controlling NASA's equipment. The NASA Equipment Management Program requires utilization of the NASA PP&E System by all NASA Centers. This chapter will address how equipment is managed in PP&E and describe Goddard's responsibilities and users' roles and relationships.

3.3 COMPONENTS

PP&E consists of the following components:

- (1) Systems, Applications, and Products (SAP) containing the following modules:
 - (a) Asset Accounting containing the Asset Master Records (AMR)
 - (b) Plant Maintenance containing the Equipment Master Records (EMR)

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- (2) EQUIPMENT - the web based front end
- (3) DISPOSAL - the disposal component
- (4) Business Object Analysis (BOBJ) - to conduct queries and generate reports

3.4 ROLES AND RESPONSIBILITIES – PP&E CONTAINING THE EQUIPMENT MASTER RECORDS (EMR)

Goddard shall collect necessary data to maintain the Equipment Master Record (EMR) data in PP&E; select and provide the inputs which enable PP&E to be a working integrated accounting and control system; acts as the input source and prime user of output data by collecting data about its government-held equipment and in-house holdings and providing the basic information necessary to operate PP&E and have the following focal points: SEMO, Center Business Process Lead, Center Equipment Manager, Equipment Control Team, the Inventory Team and the Logistics Super User. The PP&E duties of these focal points are as follows:

3.4.1 SEMO or designee (Deputy Branch Head): located in the Code 273 Supply and Equipment Management Branch shall ensure the following:

- 3.4.1.1** Standardization and updating of information pertaining to PP&E Center-held equipment
- 3.4.1.2** Requiring follow-ups to resolve problems related to data submission
- 3.4.1.3** Monitoring and evaluating the use of PP&E data
- 3.4.1.4** Overseeing the Center Equipment Control and Inventory Teams

3.4.2 Center Business Process Lead: Acts as primary interface to Integrated Enterprise Management Program's Application Functional Support Experts, Center Equipment Manager, Property Disposal Officer and Property Accounting for business process improvements, training issues, and reporting requirements for the Center; actively participates in problem identification and resolution of all issues in these areas

3.4.3 Center Equipment Manager/PP&E System Administrator: located in the Code 273 Supply & Equipment Branch, shall complete all mass update transactions, establish new property custodians and new property accounts as appropriate, delete property custodians or disestablished property accounts as needed, perform all Center Inventory processes for the Sub Installations associated with their organization role and Sub Installation role, open and close the Inventory Campaign, process property custodian account transfers resulting from reassignments, reorganizations, retirements, and separations, and provide equipment data queries to management and other customers as requested

3.4.3.1 Equipment Control shall: Process, create, update, and deactivate Equipment Master Records

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3.4.3.2 Functions include **creation** of Equipment Master Records for equipment:

- (a) Purchase – NASA Funded
- (b) Purchase – OGA Funded
- (c) Transfer – From NASA Installation
- (d) Transfer – From OGA
- (e) Transfer – From Contractor
- (f) Lease In
- (g) Loan In
- (h) Fabrication
- (i) Assembly/Disassembly
- (j) Found on Station
- (k) From Excess
- (l) Retagging
- (m) Transfer of Real to Personal Property
- (n) Equipment from Non-Government Source
- (o) Equipment Not Previously Meeting Criteria for Tagging
- (p) Item Previously Surveyed
- (q) Receipt Resulting from Conversion of Lease to Purchase
- (r) Receipt from Replacement from Vendor

3.4.3.3 Functions include **updates** of Equipment Master Records for equipment:

- (a) Transfer – From NASA Installation (Sending Center data)
- (b) Transfer – From Contractor
- (c) Assembly/Disassembly
- (d) From Excess inside NASA

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- (e) Reinstating Item Previously Surveyed
- (f) Conversion of Lease to Purchase
- (g) End User/Custodian Changes
- (h) Various other attribute changes (High Risk Flag, FSC code, repairs, loans, storage, etc.)
- (i) End User Acceptance
- (j) In/Out Status (Borrows, Loans, Storage, Repairs)

3.4.3.4 Functions include **deactivation** of Equipment Master Records for equipment:

- (a) Transfer to Other Government Agency
- (b) Transfer of GFE to a Contractor
- (c) Lease In – Returned
- (d) Loan In – Returned
- (e) Survey (Missing Equipment)
- (f) Decontrol (Removal of Tag)
- (g) Deletes Resulting from Assembly/Disassembly
- (h) Delete From Retag
- (i) Delete Resulting from Trade-in
- (j) Transfer to Real Property
- (k) Excess
- (l) Dispositioned by SSP AWG
- (m) Delete Resulting from Replacement by Vendor
- (n) Destroyed in Orbit

3.4.4 Inventory Team shall:

3.4.4.1 Scan equipment and upload scanned barcode and RFID data for an Inventory

3.4.4.2 Document Inventory Overrides

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3.4.4.3 Process various Inventory Campaign reports**3.4.4.4** Perform the following inventory related functions in PP&E:

- (a) Update EMRs for associated Center and Sub Installation
- (b) Document Inventory Override for associated Center and Sub Installation
- (c) Upload barcode and RFID data for associated Center and Sub Installation
- (d) Inventory Missing Item Report
- (e) Inventory Overage Report
- (f) Sensitive Items Report
- (g) In/Out Code Status Report
- (h) Inventory Override Report
- (i) Display Equipment

3.4.5 **Logistics Super User** shall:**3.4.5.1** Process all Center-to-Center transfers for Goddard, NASA HQ and Wallops**3.4.5.2** Perform the following functions in PP&E:

- (a) Update equipment for all Sub Installations
- (b) Display equipment for Sub Installations
- (c) Find/List equipment – Change/Display

3.5 NASA PP&E SYSTEM: EQUIPMENT

EQUIPMENT is the web based front end to the NASA PP&E System. Users can access EQUIPMENT via b-Ready or via direct Internet access. EQUIPMENT is an integrated part of NASA PP&E System. It is an easy to access, user friendly, web-based application that facilitates the real time updating, tracking, managing, and reporting of controlled equipment for property custodians and equipment users. EQUIPMENT is available to civil servants employees and on-site contractors in the NASA Enterprise Directory.

3.5.1 ROLES AND RELATIONSHIPS**3.5.1.1** **Property Custodian Role**

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- (1) Establish procedures for the accountability and tracking of controlled equipment, including sensitive items in EQUIPMENT.
- (2) Maintain records in assigned property accounts in accordance with equipment control procedures.
- (3) Process location changes, custodian account changes and end user changes.
- (4) Validate end user changes.
- (5) Search for active and inactive equipment.
- (6) Request Equipment Control Tag for untagged equipment.
- (7) View all equipment assigned to custodian account.
- (8) Transfer property from one custodian account to another property custodian account.
- (9) Declare controlled and administratively controlled equipment as excess.
- (10) Find links to equipment related forms for processing such as the Property Pass

3.5.1.2 End User Role

- (1) Protect and conserve all equipment, supplies, and other property and materials entrusted to them
- (2) Follow all rules and regulations associated with the property in their control
- (3) Accept or reject receipt of equipment as the end user
- (4) Initiate end user changes
- (5) Accept equipment as the result of a change of end user
- (6) Initiate location changes
- (7) Create property pass
- (8) Request tags for new equipment or to replace damaged or missing tags
- (9) Search for equipment (active and excess)
- (10) View all equipment assigned
- (11) Transfer equipment to another equipment user

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- (12) Initiate a request to excess controlled or administratively controlled property
- (13) Include the automatic routing of email messages to assist with notification of actions

If a user chooses not to use EQUIPMENT or the change needed cannot be made in EQUIPMENT, then the assigned equipment user must notify the responsible property custodian to make the change to the Equipment Master Record in EQUIPMENT.

Chapter 4. EQUIPMENT ACQUISITION – PROCESSING ADDS IN PP&E (E01)

4.1 SCREENING PROCUREMENT REQUESTS

The Code 279 Equipment Control staff shall view the In Box in PP&E Easy Access, Business Objects Workplace on a daily basis to check for pending purchase requests for Greenbelt and Wallops. Before a new item of equipment is procured, all purchase requests for new equipment having an acquisition value of \$25,000 shall be screened via the DISPOSAL Reutilization Report to determine if the requested item or an acceptable substitute is available. At a minimum, a manufacturer model search of the item shall be performed. If the selected model number is not located, the “Release Box” will be checked to allow the purchase to proceed. The Defense Reutilization and Marketing Services (DRMS) and GSAXcess are additional sources for screening.

4.2 SCREENING DOD INDUSTRIAL PLANT EQUIPMENT REQUISITION (DD FORM 1419)

Prior to new acquisition of items, contractors (located at Greenbelt and Wallops) are required to submit a request for screening via the DD Form 1419 (**Attachment 1**) to the Code 279 Equipment Control. The forms can be forwarded via fax, hand carried, mailed, or electronically via an email attachment and must have the Contracting Officer’s signature. The DISPOSAL Reutilization Report will be used to screen the pending purchase. If the selected model number is not located, Equipment Control will sign and add a certification number on the DD Form 1419, indicating the purchased was screened in accordance with NASA policy. The certification number (example: 09-041-5-002) consists of the last two (2) digits of the current year, Julian date, installation number and document number received for each day.

In addition to retaining a copy of the DD Form 1419, a logbook will be maintained to include the following data: Date received, Contract number, Initiator, Item Description, Certification number, and Date expires (45 days from date of screening).

4.3 CONTROLLING EQUIPMENT

4.3.1 Controlled Equipment - a tangible asset that is functionally complete for its intended purpose, durable, and nonexpendable, is tagged with an equipment bar code containing an Equipment Control Number (ECN) and a RFID tag enrolled to the ECN in NASA PP&E System

4.3.1.1 The tag is used to uniquely identify controlled NASA equipment from administratively controlled equipment.

4.3.1.2 The Federal Supply Classification Codes, as listed in the Federal Cataloging Handbook H2 series, shall be used to classify all controlled equipment in the NASA PP&E System.

4.3.1.3 Equipment is received at the Receiving dock, Building 35, direct delivered to site or hand carried by Center employees.

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- 4.3.1.4** Equipment that is controlled is tracked in PP&E System; Receiving will notify Equipment Control when an equipment item meeting controlled criteria is not tagged in Receiving (static wrap, crated); Equipment Control shall tag the item in the division upon acceptance by the owning organization.
- 4.3.1.5** If equipment is direct delivered or hand carried on Center, it is the responsibility of the employee to notify Equipment Control that equipment has been received and requires tagging. If equipment does not meet the criteria for control, then a NF1517 or NF1517a (silver ball) will be affixed to indicate that it is government property.

4.3.2 CRITERIA FOR CONTROLLED EQUIPMENT

- 4.3.2.1** Capital Equipment – PP&E with an acquisition cost of \$500,000 and over and a useful life of 2 years or more that are either purchased and/or fabricated to support a project's objectives and have a reasonable expectation (slightly greater than 50% likelihood) the item will be used on another program/project as stated in NPR 9250.1, Property, Plant, and Equipment Operating Materials and Supplies). Acquisition cost includes all "add-ons" such as internal components, installation, storage, shipping, discounts, credits and trade-ins. Owning organization shall complete the Capitalization Determination Form (CDF) NF1739 when equipment with an acquisition cost of \$500,000 and over is to be capitalized. (Attachment 15)
- 4.3.2.2** Administratively Controlled Equipment – Equipment with a value of \$4,999 or less that does not meet tagging criteria, but is managed using local procedures established by the SEMO to ensure property accountability and prevent fraud, waste and misuse.
- 4.3.2.3** Sensitive Equipment – Equipment due to its pilferable nature or the possibility of it being a hazard requires a stringent degree of control. Sensitive items are listed on Equipment Meeting Tagging Criteria, Attachment 2 and valued at \$500 or more; weapons and hazardous equipment or devices, exhibits/display items, tablets, safes, rolling stock (any item requiring a NASA license plate) will be controlled regardless of their value; and equipment determined to be pilferable by the Center SEMO

4.4 MONITORING BAR CODE EQUIPMENT TAGS

- 4.4.1** Distribution: Equipment tags will be maintained by the Code 273 Supply & Equipment Management Branch. Equipment Control Team Lead will obtain and sign for tags as needed. The equipment tags will then be distributed to the Equipment Control personnel designated to complete tagging during the functions of receiving, tagging in division, reutilizations from the Excess Warehouse and as required while conducting Center inventories. Similar process will be followed to maintain control and distribution of tags for Wallops, WSC & NASA HQ personnel.

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4.4.2 Equipment Tag Control Register: Equipment Control shall maintain a register to track tags *issued* to Equipment Control personnel, Receiving, WFF, WSC and the Disposal Supervisor. The Tagging Register shall consist of Date Issued, Sequence of Tags Issued, and Signature of person receiving tags.

4.5 TYPES OF TAGS

There are two types of NASA owned equipment bar-coded tags (Attachment 4) in use for NASA controlled equipment and four (4) types of RFID passive-type tags.

- (1) Regular tags: 5/8 x 1-13/16 inches = used for most types of equipment
- (2) Mini-tag: 1/4 x 1-3/8 inches = used for items that do not have enough space for a regular tag to be applied
- (3) RFID tags: Used on all NASA controlled property

4.6 VIRTUAL TAGGING

Assets that cannot be physically tagged due to form, fit, and/or function, may be tagged using a virtual tagging process. This process shall be applied by exception only and could include putting the tag on a printed hardcopy of the item's Equipment Master Record (EMR), picture, or other traceable document. For virtual tagging, a request must be submitted in writing by the user with a detailed explanation to justify this exception.

4.7 ADMINISTRATIVELY CONTROLLED EQUIPMENT

Administratively controlled equipment includes items with an acquisition cost of less than \$5,000 and is not classified as sensitive. Since administratively controlled equipment is not tracked in the PP&E System, each owning organization shall establish internal procedures to ensure items are assigned to equipment users, tracked at all times, including the processing of appropriate documentation after receipt, removal, transfer, loan, etc. Each item of administratively controlled equipment shall be affixed with a "Property of U.S. Government" decal, NASA Form 1517, except when not physically or technologically feasible. Smaller versions of the decal, NASA Form 1517a, are also available for use on small items of administratively controlled equipment. Distribution of these decals to Center customers is documented via a log located in a SharePoint folder to track distribution activity. (Attachment 4)

4.8 ADDING CONTROLLED ITEMS TO PP&E – IE01

Establishing and maintaining equipment identification and accountability in the PP&E database is completed by Equipment Control upon receiving various documents to add items to the PP&E database such as: Load sheets (from Receiving or Equipment Managers), Found-on-Station, Fabrication (GSFC 20-68), and Transfer documents. All adds (i.e., newly received equipment) to

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PP&E require appropriate supporting documentation. Equipment Control is responsible for entering data for new equipment procured by GSFC (Greenbelt & Wallops) or its contractors, including WSC, IV&V, and NASA HQ in the PP&E database.

4.8.1 CATALOGING: Equipment Control is responsible for the integrity of the PP&E database. The Equipment Control Tagger serves as the Cataloger who reviews and standardizes equipment item names and manufacturer codes, model numbers, and Federal Supply Class (FSC). The Equipment Control Tagger/Cataloger will ensure that each load sheet is complete and correct and includes the appropriate supporting documentation (i.e., purchase request, contract, or shipping document).

4.8.1.1 The H-6, Defense Logistics Service Center, Cataloging Handbook, will be the reference for correct noun name. The H-2 series will be used for classifying all equipment and assigning the FSC. If a new manufacturer is cited, then a 5-digit manufacturer's code will be created by the Code 273 PP&E System Administrator and submitted to the IEMP Competency Center to add to the PP&E Manufacturer Table.

4.8.1.2 Equipment Control shall conduct a 100% quality review of all completed load sheets prior to forwarding to the Code 279 Data Entry Clerk for input into the PP&E database.

4.9 PROCESSING LOADSHEETS

Equipment Control shall:

- (1) Obtain the Load sheets from Receiving on a daily basis. The PP&E Load sheet, Attachment 5 is time stamped for tracking the number of days for cataloging and data entry in PP&E. Load sheets are forwarded to Cataloging, if required.
- (2) Write the model numbers from the information plate, prefixed with "M/N", if available. (If the model number is not identified on the information plate, mark the model number on the purchase order/contract with "M/N")
- (3) Write the manufacturer's name, city and state, prefixed with "MFR" if available from the information plate; if the manufacturer's name is not identified on the information plate, mark the manufacturer's name on the purchase order/contract with "MFR." (Note: Ensure the ACTUAL MANUFACTURER rather than a distributor or supplier is annotated)
- (4) Enter the Item name as "noun-comma-type"
- (5) Ensure the property account is correct
- (6) Ensure items have user number/name entered in PP&E

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- (7) Ensure acquisition values include all costs for placing the property into service including installation and transportation fees

4.10 DATA ENTRY INSTRUCTIONS

The process for controlling documentation is as follows:

Equipment Control shall:

- (1) Receive customer request/documentation via the Equipment e-Mail box, internal mail, fax or hand-delivered
- (2) Research documentation to fill in missing or incorrect information
- (3) Return incomplete documentation packages to the originator to obtain the required information
- (4) A research sheet, (Attachment 6), shall be attached to each document package only if the transaction cannot be processed within 4 workdays. The research sheet documents the action taken to resolve the problem, i.e. additional information on manufacturer, cost break down, item name information, etc.
- (5) Maintain a complete audit trail, log of phone calls to individuals, copies of any e-mails requesting information, etc., to document the reason the transaction was not processed within the required time frame
- (6) Research the problem and if unable to resolve within 5 workdays, forward the package to the Code 273 Equipment Manager for resolution. When resolution is complete, the PP&E will be updated as appropriate.
- (7) Once package is complete and all supporting documentation is attached, Equipment Control shall date/time stamp and submit the package to Data Entry Clerk to process the transaction in PP&E. (Data Entry at Greenbelt also supports data entry for WFF and NASA HQ).
- (8) Data Entry Clerk will complete the transaction(s) in PP&E, print the adhoc screen for the transaction, sign and date, and file the package in the daily folder.
- (9) Data Entry Clerk will run a Transaction Report to verify all transaction packages for the previous day were received and filed.

4.11 PROCESSING CONTROLLED EQUIPMENT

4.11.1 Receiving personnel at Greenbelt, Wallops & NASA HQ shall:

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- 4.11.1.1** Update the Receipt of Goods in PP&E which will then populate the remaining Purchase Order (PO) information
 - 4.11.1.2** Inspect the property to ensure the item received is the same as the item described on the shipping document and purchase order
 - 4.11.1.3** Update the quantity received and click on “OK” to submit the receipt of the property
 - 4.11.1.4** Update the information in PP&E as “Release from GR Block Stock” and click on “OK” to show the property has been accepted (If an item is cancelled or needs to be returned, the Receiving personnel shall initiate a “Notice of Rejection”)
 - 4.11.1.5** Tag the equipment item with a PP&E equipment control tag if the item meets the tagging criteria as noted in 4.3.2., and annotate the ECN on the purchase order document or the Receiving and Inspection (R&I) document.
 - 4.11.1.6** Time stamp the supporting documents and forward to Equipment Control on a daily basis
- 4.11.2** Equipment Control shall:
- 4.11.2.1** Review the documents, updating any information necessary for equipment to be processed into the PP&E system, prepare a Load Sheet (Attachment 5) and enter data into PP&E.
 - 4.11.2.2** Prepare a daily Tag Register Log annotating the ECN, PO Method, Code, Item Name, and End User’s Name
 - 4.11.2.3** Generate, on a daily basis, a transaction report listing all transactions processed the prior day
 - 4.11.2.4** Attach a picture to each EMR for any purchased transactions when the acquisition value is equal to or greater than \$500,000 so that the Property Accountant receives the required data to build the AMR if appropriate.

4.12 TAGGING IN DIVISION (TID) – PP&E ACQUISITION METHOD 01

- 4.12.1** Equipment items, meeting the criteria of controlled property, and not tagged in Receiving upon receipt or items directly delivered, will be tagged at their location within 8 workdays of notification for non-capital and 20 workdays for capital equipment in accordance with PM9 as noted in PM9, Metrics. The supporting documentation will be a Tag-In-Division Load Sheet, Attachment 7 along with a **Found on Station (FOS), NF 1618.** The data entered on the Tag-In-Division Load Sheet out in the field will be transferred over to the PP&E Load Sheet (Attachment 5). A Purchase Order, R&I from Receiving and the PP&E Load Sheet will be the supporting documentation if the item came through Receiving but

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was not tagged. (See Section 4.12.2) Wallops, WSC & NASA HQ equipment personnel will tag the equipment, complete the PP&E Load Sheet (Attachment 5) and forward to Equipment Control via GSFC-05-equipment@mail.nasa.gov.

4.12.2 When notified of a TID by Greenbelt Receiving, Wallops Receiving, HQ Receiving or the end user, Equipment Control shall enter the following information in the Work Information Tracking System (WITS): Request Received Date, Date Entered in PP&E, Date Completed, Due Date, Summary of Request, Status, Organization Code, Customer, Description, Capital Indication, ECN, Item Name, and Request Type.

4.12.3 In addition, Equipment Control (Greenbelt), the WFF Equipment Manager and the HQ Property Administrator shall:

- (1) Visit tagging sites and verify that equipment meets tagging criteria and obtain documentation
- (2) Write the number of the next tag in sequence with an "ECN" prefix
- (3) Place the NEXT TAG IN SEQUENCE on the front of the item, if possible. Otherwise, place the tag in a conspicuous spot as close as possible to the front of the item. (***NOTE: The equipment will not be tagged until all documentation is available from the owning organization to complete adding to PP&E.***)
- (4) Complete the PP&E Load Sheet (Attachment 5) and attach the available documentation. Review for accuracy and completeness, then time stamp and forward the packet to the Equipment Data Entry Clerk to add to the PP&E system, and close the ticket in WITS. (The WFF Equipment Manager will scan and forward documentation to GSFC-05-equipment@mail.nasa.gov)
- (5) Note: All administratively controlled equipment identified during a TID will be affixed with the NF 1517 or NF 1517a.

4.13 FOUND ON STATION (FOS) – PP&E ACQUISITION METHOD 12

4.13.1 If equipment has been on Center for one year or more without being controlled, a FOS document, NF 1618 shall be completed along with creating a WITS ticket. (A WITS ticket for WFF and NASA HQ FOS will be completed at Greenbelt upon receipt of FOS documentation. If a copy of the purchase request is available, the purchase order number shall be used for the acquisition document number in PP&E but still processed as a FOS. A load sheet shall be completed and included for data entry purposes.

4.13.2 Equipment Control (Greenbelt), the Equipment Manager (WFF) and the Property Administrator (NASA HQ) shall:

- (1) Visit tagging sites and verify that equipment meets criteria for control

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- (2) Obtain documentation, if available; (if no paperwork is available ensure it is annotated on the FOS) *Note: Ensure complete data is available prior to placing tag on equipment.*
- (3) Query PP&E to ensure the item is not already on record
- (4) Maintain suspense copy, leaving the original copy of the FOS with the property custodian for division chief review and signature
- (5) The WFF Equipment Manager and the HQ Property Administrator shall forward documentation to **GSFC-05-equipment@mail.nasa.gov** for Equipment Control.

4.13.3 Equipment Control shall:

- (1) Update PP&E.
- (2) File original in the appropriate property account inventory folder.
- (3) Ensure FOS for capital equipment is completed and signed by the division chief, reviewed by the Equipment Manager and signed by the SEMO prior to updating PP&E. SEMO shall ensure a documented investigation is conducted to determine the circumstances that allowed the equipment to be on site without equipment management control.

4.14 FABRICATION – PP&E ACQUISITION METHOD 10

4.14.1 Ads to PP&E resulting from equipment fabricated on Center shall be documented by the owning organization, using the Control/Capitalization of Locally Fabricated Equipment, GSFC 20-68. The equipment is purchased under a purchase order or contract depending on the value and assembled on-site. (The WFF Equipment Manager shall forward the documentation to **GSFC-05-equipment@mail.nasa.gov**).

4.14.2 Equipment Control shall:

- (1) Obtain a copy of the supporting documentation, if available
- (2) Ensure the fabrication form is signed by the Division Chief
- (3) Ensure the acquisition cost is justified for capital equipment, thus the supporting documentation is essential.
- (4) Prepare PP&E Load Sheet (Attachment 5)

4.15 TRANSFER IN - PP&E ACQUISITION METHODS 04, 05, 06

Equipment can be received from another NASA Center (TC 04), from another Government Agency (TC 05) or from a Contractor (TC 06). Equipment Control shall:

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- (1) Ensure documentation to process the equipment into PP&E is complete and accurate, and includes the ECN(s) for equipment items being transferred from another NASA Center or a Contractor
- (2) Verify with the organization that the equipment has arrived
- (3) Ensure the items are tagged as noted in Section 4.3.2 and a load sheet is prepared to add the equipment items into PP&E if the items are not already tagged; (the WFF Equipment Manager and the HQ Property Administrator shall forward the complete package to **GSFC-05-equipment@mail.nasa.gov** for completion in PP&E.

4.16 LOAN-IN/LEASE-IN EQUIPMENT - PP&E ACQUISITION METHODS 09/08 & 21

4.16.1 Any organization loaning or leasing equipment to GSFC must have a written agreement with GSFC, stating the loan purpose and period. (Equipment identified in writing for lease or loan for 60 calendar days or less need not be accountable). All incoming loans and leases of equipment that meet the criteria for control, regardless of source, shall be processed and recorded in PP&E at the time of receipt with the following exceptions:

- (a) Equipment under NASA-wide contracts, such as cost-per-copy-service contracts
- (b) Equipment provided under seat contracts, in which a service is acquired by the Center and property is owned by the contractor, incidental to the service

4.16.2 Equipment Control (Greenbelt), the Equipment Manager (WFF) and the Property Administrator (NASA HQ) shall:

- (1) Ensure appropriate documentation is on file and the equipment is physically identified as belonging to the organization
- (2) Affix a tag to incoming loaned or leased equipment at the time of receipt to show clearly that such equipment is not owned by the Center for equipment (loaned or leased for at least 60 days) meeting the controlled criteria.
- (3) WFF and NASA HQ shall forward the documentation to Equipment Control via **GSFC-05-equipment@mail.nasa.gov** for processing in PP&E.

4.16.3 Equipment Control shall:

- (1) Process a Receipt from Loan In (TC09) or a Receipt by Lease In (TC08) in PP&E using a copy of the purchase order
- (2) Record the estimated original acquisition cost on the EMR for incoming loaned and leased items

- (3) Establish a log (worksheet) for tracking of the loan/lease with a loan/lease number assigned including: the date assigned, name of the agency/business, the property custodian for the code receiving the equipment, the account number and phone number, type of loan/lease, quantity of items, value, expired date, date closed, purchase order number, remarks, and the GSFC Authorizing Signature (division chief or above)
- (4) Ensure leased equipment is subject to capitalization if the original acquisition cost (value of asset, not value of lease) is \$500,000, as determined by the Finance Property Accountant
- (5) Ensure all incoming leased equipment is reviewed by the Property Accountant to determine when capitalization requirements apply. When a leased item is not subject to capitalization, Equipment Control shall be notified to remove the link to the Asset Master Record (AMR).
- (6) Review the Lease/Loan In Expiration Report (via BobJ) on a monthly basis to identify all incoming loans and leases due to expire
- (7) Arrange for return of the loaned or leased equipment or request an extension from the authorizing official of the loan or leasing organization
- (8) Update the EMR with a date due and place a copy of the documentation in the loan file if loan is extended for a year
- (9) Ensure if the equipment has been returned to the company, the organization documents the return with a GSFC 20-4 shipping document with the ECN tag affixed.
- (10) Update the EMR with Lease-in Returned, TC 69 and Loan –In Returned, TC 70; close the file
- (11) Tag and execute a *Convert Lease to Purchase (TC 21)* to the EMR in PP&E

4.17 CONTROL OF DOCUMENTS – DOCUMENT SCANNING

4.17.1 Equipment Control shall:

- (1) Ensure all documentation and actions affecting the accountable records, such as activations, deactivations, and cost adjustments, are serially controlled and processed promptly
- (2) Ensure all source documents, including those for the inventory campaign are annotated/compiled and indexed by Date (day/mo/year) and ECN (Object Value), Document Number and archived on a routine basis since PP&E does not generate an equipment reference number for supporting documents.

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- (3) Ensure copies of the documentation are maintained in accordance with NPD 1441.6 (NASA Records Management and NPR 1441.1 (NASA Records Retention Schedules)
- (4) Collect the data entry documents from the designated Daily Work Folders
- (5) Obtain the PP&E Transactions Register Report from BobJ to validate source documents
Ensure documentation for each sub-installation is collated and scanned separately.
- (6) Sort documents by date
- (7) Ensure each transaction has a PP&E Transaction Display Screen showing the ECN and Document Numbers for the scanning process
- (8) Check PP&E to ensure copies have been made for all the previous day's data entries
- (9) Ensure copies are made of all required transactions (e.g., all adds and deletes, transfers, dollar changes, etc.) with a value of \$500,000 and above and forwarded to Accounting, Code 151.4
- (10) Retain all original documents in accordance with the retention schedule

4.18 RECONCILIATION, ADJUSTMENT, AND REPORTING OF PROPERTY RECORDS AND FINANCIAL ACCOUNT BALANCES

- 4.18.1** The Center Finance Property Accountant will be informed of changes of property capital equipment via PP&E by performing a review of the EMR/Asset Master Record (AMR) Integration Report.
- 4.18.2** The Center SEMO shall assist the Center Finance Property Accountant, as needed during periodic financial analyses.

Chapter 5. CHANGING AND DEACTIVATING CONTROLLED ITEMS IN PP&E - IE02

This chapter applies to Goddard's Government-owned equipment and provides the administrative requirements for maintaining equipment identification and accountability, Transfers, Loan/Lease, Storage, Equipment Loan procedures, off-site use of Government-owned equipment by on-Center government and contractor employees, External loans, Trade-Ins, Cannibalization/Modification, and Survey of missing items.

Equipment Control is responsible for entering new/changed equipment descriptive data in accordance with PP&E transactions listed on Attachments 8 and 9. Equipment Control receives documents from Code 273, mail, fax or email. All documents shall be date/time stamped for tracking of timeliness, in accordance with Performance Metric 10. All adds and changes will have appropriate supporting documentation.

5.1 CANNIBALIZATION/MODIFICATION

5.1.1 A cannibalization is the removal of serviceable parts, components, or assemblies from an equipment item to be used as replacement parts in other equipment or to fabricate another item. A modification is a change made to an equipment item to give it a new value, appearance, or to serve a new purpose. The owning organization will complete the *Request For Cannibalization & Modification of Controlled Equipment*, NF1617 and obtain SEMO approval prior to completing the cannibalization.

5.1.2 Equipment Control (Greenbelt, NASA HQ and the WFF Equipment Managers) shall:

- (a) Review Cannibalization/Modification for completeness and signatures (requestor, property custodian, contracting officer, if required, and the division chief)
- (b) Indicate what transaction(s) need to be processed for each ECN listed
- (c) Ensure a copy of the purchase request listing the value of the equipment that was installed into the existing equipment is included if the equipment has been modified
- (d) Complete a Route Slip, Attachment 10 routing the cannibalization/modification through the Equipment Manager (review) and SEMO (approval) to the Equipment Control
- (e) Update the Acquisition Value Field to reflect the equipment's change in value in PP&E if the cannibalization or modification dollar (\$) adjustment (+ or -) is \$1,000 or greater. If the equipment's change in value is under \$1,000 (+ or -), PP&E shall be updated only if the adjustment affects the controlling or decontrolling of the equipment item.
- (f) Ensure if the equipment has been cannibalized and there is additional equipment meeting the criteria for control, the new item(s) is tagged

- (1) Prepare a load sheet for the new items(s) creating a new EMR in PP&E with a Assembly or Disassembly, (TC 11); (See Section 4.11 Processing Controlled Equipment)
- (2) Forward copy of the NF1617 to the Property Custodian
- (g) Ensure any equipment not meeting the criteria for control is deactivated in PP&E with a TC 73 – Delete Resulting from Assembly/Disassembly
- (h) Ensure the tags are pulled from the equipment and affixed to the cannibalization – modification form
- (i) Ensure any residual items no longer needed are excessed by the organization

5.2 EQUIPMENT REPAIRS

Equipment Control (Greenbelt, NASA HQ and the WFF Equipment Managers) shall maintain control over equipment that is removed from the Center for repairs or calibration by updating the EMR in PP&E to out-Coded Repair status including date out and a projected Return date.

5.3 REMOVAL AND USE OF EQUIPMENT BY EMPLOYEES

- 5.3.1** Equipment may be temporarily loaned to government employees for use at home or elsewhere when the division chief or designee determines it is necessary or beneficial in the conduct of GSFC's missions or other official Government purposes The EMR shall be updated as a Borrow Out in PP&E.
- 5.3.2** The Government Equipment User shall: Complete a Property Pass Request and Removal Permit, NF 892 for up to 180 days, providing the purpose for use and removal of the equipment, and, an explanation of why the official use cannot be accomplished on site during normal business hours
- 5.3.3** The on-site Contractor Equipment User shall:
 - (1) Complete a NF 892, Property Pass Request and Removal Permit when the loan will not exceed 30 days, obtaining the Property Custodian and Contracting Officer signatures.
 - (2) Complete a GSFC 20-4, shipping document for loans exceeding 30 days, obtaining the Contracting Officer and Property Custodian approvals since the equipment shall be transferred to the contractor as Government Furnished Equipment (GFE) in accordance with the FAR Supplement
 - (3) Forward the GSFC 20-4 shipping document to Equipment Control to deactivate the Equipment Master Record (EMR) in PP&E by doing a “Transfer of Government Furnished Equipment (GFE) to a Contractor,” (TC 67), including the contract number. (A copy of the shipper will be forwarded to the IPO to ensure the contract is

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appropriate). The equipment will remain GFE'd until the end of the contract or until the item is no longer needed on the loan.

5.3.4 Equipment Control shall:

- (1) Process a borrowed out in PP&E for loan agreements with Government employees when the loan is for 30 days or more.
- (2) Change the building location as GS-GSFCDS2, GSFC Employee Borrows Out and show the due date for the equipment
- (3) Add the due date for the equipment to be returned
- (4) Process a Borrowed out - Returned when the user returns the equipment

5.3.5 Extensions shall be requested prior to the expiration date of the loan. Equipment will be returned when the specified purpose for the loan is no longer valid or at the end of the approved loan period, whichever is earlier. If the equipment is required beyond 180 days, a new loan request will be required. Flexible workplace agreements may contain provisions for long-term equipment loaned to individual employees. Equipment loaned in this manner need not be returned for inventory/inspection until the agreement is terminated.

5.4 EXTERNAL LOANS – (SEND)

5.4.1 Background: GSFC's equipment may be loaned to Government and non-Government organizations, private individuals, corporations, or other entities, provided the loan is in the public interest and meets the following criteria: (a) the borrower has both the facilities and capability to secure and safely operate the equipment; (b) the loan will be temporary; (c) it will benefit the Government; (d) the borrower acquires no rights to the equipment and (e) the equipment is not modified. For any loan involving equipment costing \$500,000 or more, a copy must be provided to NASA Headquarters, Logistics Management Division. Loan agreements shall not exceed 4 years with an additional 1 year extension and shall be documented via the Loan of NASA Equipment, NF 893. (The complete documentation (GSFC 20-4, Shipping Request and NF 893 form) of all external loans at Wallops and NASA HQ shall be forwarded to Equipment Control at Greenbelt for approval and processing). There are two (2) types of external loans:

- (1) **Within NASA** - the loan is internal to NASA: (a) **Center to Center** if the loan is executed among Centers; (b) **Within Center** if the loan is executed between organizations within the Center's responsibility; (c) **Other** if the loan is executed among NASA organizations and under circumstances not described herein
- (2) **Outside NASA** - Loan is external to NASA: (a) **U.S. Gov't**, if the loan is to a U.S. Government entity; (b) **Private**; (c) **Foreign** - Lending organization and their Enterprise organization works with NASA Headquarters to prepare Memorandum of Agreement

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(MOA); (d) **Partnership Agreement** if the loan is to an entity under a partnership agreement

5.4.2 Information Required on the Loan of NASA Equipment, NF 893

- (1) Loan/Agreement Number - Loan Number shall be assigned to the loan by Center logistics for control purposes; also the Partnership Agreement Number if in support of a Partnership Agreement. The Loan/Partnership Agreement Number shall also be recorded in PP&E to indicate the “Out Status” of equipment items.
- (2) Loan From (NASA) - Identifies the organization and the NASA official lending the equipment; name and address of the Center and organization within the Center lending the equipment; and the Organization, Program, or Project, and the full name of the NASA official sponsoring the loan.
- (3) Loan to Borrower: shall identify the organization borrowing the equipment, the name of the responsible individual/official representing the borrowing organization and where the equipment will be located for the duration of the loan.
- (4) Loan Details - Start Date, which is the effective date the borrowing official takes custodial responsibility of NASA property, including in-transit period; the End Date is the effective expiration date of the loan, which is the date the NASA official regains physical custody of the equipment after the in-transit period
- (5) Purpose of the Loan – Shall include the agreement number if in support of a partnership agreement; otherwise shall clearly explain the benefit to NASA and the NASA mission requirement satisfied by the loan
- (6) Equipment Information - Shall include the ECN assigned to the equipment along with the full item name/description, the Model and Serial numbers, FSC and the acquisition cost
- (7) Terms and Conditions - Shall include Terms and Conditions of the loan for all parties to read and agree upon
- (8) Approvals: Name/Title of Signing Official:
 - (a) The Program/Project Official, Division Director/Exhibit Manager, or equivalent NASA official approves the release of the equipment, and signs/dates
 - (b) The signing official of the borrowing organization representing the borrowing organization agrees with the terms and conditions of the loan, prints name, and signs/dates.

- (c) The Office of General Counsel and the Office of Chief Counsel reviews the loan in accordance with NPD 4200.1, and signs/dates prior to the agreement being signed on behalf of NASA.
 - (d) The Office of International and Interagency Relations and the Export Control Administrator reviews the loan if the loan is to a foreign entity.
 - (e) The IPO for review of existing contracts, grants, or co-operative agreements with matching locations
 - (f) The SEMO certifies the process of the loan in accordance with NPR 4200.1, signs/dates
 - (g) The Equipment Manager, or the individual designated by the SEMO, certifies that the transaction(s) is recorded in PP&E, and signs/dates.
- (9) Official Loan File - Establish an official Loan File, ensuring the file contains the loan agreement, the shipping document, and a list of equipment items (controlled and administratively controlled); (if equipment is added to the loan during the duration of the loan, it will be processed in PP&E and the information added to the worksheet). The due date of the new equipment will be the same as the original due date for the equipment.
- (10) Monitoring - Monitor the loans to ensure each loan is certified and renewed on a yearly basis not to exceed 4 years or returned to the Center; generate an Out Status Expiration Report from BOBJ to review the status and expiration of loans. If loan extensions are determined necessary, the division chief will submit a recertification statement. If the loan is extended for a year, update the EMR with a date due change and place a copy of the documentation in the official loan file. If the equipment has been returned to the Center, then update the EMR with a Loan/Lease.

5.5 RETENTION OF INACTIVE EQUIPMENT - STORAGE

- (1) The nature of Goddard's operations occasionally makes it desirable to retain equipment, not in current use, for a specified time for other potential needs before further disposition. The Storage Information Management System (SIMS) is the automated tracking/data collection and reporting system for the GSFC Storage Program.
- (2) To access SIMS, submit a request via NAMS, which will go to the SIMS System Administrator for approval. The user guide can assist in navigating the system. The guide is located at: <https://gs279sims.gsfc.nasa.gov/sims/login>.

5.5.1 Some specific purposes for storage are listed below:

- 5.5.1.1 Firm Future Requirement.** A firm future requirement may be considered a specific purpose for equipment retention, provided that the equipment has been identified for use on a project, program, or other work activity, the planning of which has been

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approved by the Center Director. All equipment held for firm requirements shall be recertified annually by the director of the owning organization.

5.5.1.2 Heritage Asset. Equipment may only be classified as a heritage asset. If it meets one or more of the following criteria (see FMR Volume 6, Chapter 4, for Heritage information):

- (a) Historical or natural significance
- (b) Cultural, education, or artistic (e.g., aesthetic) importance
- (c) Significant architectural characteristics

5.5.1.3 Emergency Standby: Retention of equipment designated by the Center Director for emergency standby purposes may be justified. The director of the storing organization, for continued retention, will review this equipment annually.

5.5.1.4 Reporting and Control of Inactive Equipment Retained by NASA Centers:

- (1) Submit a storage request through the SIMS system
- (2) All storage requests must have a valid WBS number, funding number, cost center number, or Contract Task Number in order to pay for storage services.
- (3) The Project Storage Program is the storage of equipment and materials including program critical hardware, ground support equipment, exhibits, and other materials.
- (4) The NASA GSFC Storage Facilities are located in Laurel, Maryland, and at the Wallops Flight Facility in Virginia.

5.6 TRANSFER OUT - SHIPMENTS

5.6.1 Background: Any equipment to be hand-carried or shipped from the Center will be documented and coordinated with the Code 273 Supply & Equipment Management Branch, prior to the physical movement of the equipment in order to ensure that the proper actions and any adjustments are made to the EMR in PP&E. Equipment can be transferred off site in support of a Goddard project, to another NASA Center, to another Government Agency, or to a contractor. The Small Package Office, Export Control Office and Packing & Crating and the WFF Equipment Manager shall scan and email or fax all Transfer/Shipping Request (GSFC 20-4) that is equipment related or is going to a contractor to the Code 273 Supply & Equipment Management Branch and Equipment Control for review.

5.6.1.1 Review: Before the equipment is released for shipment, the Industrial Property Officer in conjunction with Equipment Control will review the shipper for CO approval, and other approval signatures & authority. Equipment Control will assist

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the IPO with any research. Once all signature/authority issues have been successfully resolved, the IPO shall release the GSFC 20-4 for shipment and forward the original to Code 279 Packing and Crating or the SPO via the scan copy as an email attachment. A copy of the GSFC 20-4 is forwarded to Equipment Control for data entry.

5.6.1.2 Process: Equipment Control shall:

- (1) Check for an ECN (If the ECN is missing, the property custodian shall be contacted to determine whether or not the equipment should have been tagged, and research/tag the item if required.)
- (2) Check for the correct PP&E change/update, whether or not the equipment should be decontrolled and loan verification for the shipping documents that indicate a loan (Blocks 5D or 6C)
- (3) Take appropriate tag/de-tag physical actions and ensure the EMR update in the PP&E database is completed

5.6.2 PROJECT RELATED SHIPMENTS

Equipment shipped off site in support of a Goddard or Wallops project will be documented on the GSFC 20-4, Transfer/Shipping Request. If this equipment is going to be off site for more than 60 days, the Equipment Control shall update the EMR's location in the Local Data in PP&E. The shipping document does not usually indicate the duration of the shipment, therefore, Equipment Control shall contact the initiator or the property custodian to obtain a return date. (In some cases, the equipment item(s) should be GFE'd to a contract).

5.6.3 GOVERNMENT FURNISHED PROPERTY - SHIPPED TO A CONTRACTOR

Equipment tags or other NASA identification shall not be removed from the equipment when shipped to contractors as Government Furnished Equipment under their contracts.

5.6.3.1 When controlled equipment is furnished to an off-site contractor, the contractor's records shall serve as NASA's "stewardship" or custodial records for that equipment in accordance with the FAR "Government Property" clause at 52.245-1 and contract requirements.

5.6.3.2 The GSFC 20-4, Shipping Document shall be approved by the Contracting Officer and forwarded to Equipment Control through the Center Industrial Property Officer (IPO).

5.6.3.3 Equipment Control shall deactivate the Equipment Master Record (EMR) in PP&E by doing a "Transfer of Government Furnished Equipment (GFE) to a Contractor,"

(TC 67) and add the contract number. (This also applies to all WFF and HQ shippers).

5.6.3.4 When an off-site contractor reports they no longer require property for performance of the contract, and GSFC chooses to use the property for performance of work on Center, the property shall be returned from the contractor using the appropriate transportation documentation approved by the Center IPO.

5.6.3.5 The Center IPO will coordinate the physical transfer and receipt of the property. On notification of receipt, Equipment Control will activate an EMR with the acquisition method TC 06 - "Receipt by Transfer - From Contractor" or reactivate the inactive EMR, using the same acquisition method, and place the items in the appropriate property custodial account.

5.6.3.6 If GSFC, WFF or HQ chooses to reassign the property from one off-site contract to another off-site contract; only the equipment which meets the criteria for "Capital" shall be activated (or reactivated) using acquisition method TC 06 - "Receipt by Transfer - From a Contractor" to document in PP&E that the equipment was returned to GSFC. Subsequently, the EMR for the "Capital" equipment shall be deactivated as a "Transfer of GFE to a Contractor" (TC 67) to the succeeding contract. Supporting transfer documents must be approved by the Contracting Officer and routed through the Center IPO.

5.6.3.7 If the Contract number is for a different Center for NASA use, the Center Equipment Manager at the gaining Center will acknowledge receipt of the property in PP&E. Equipment Control shall reactivate or activate the EMR (as necessary) for all controlled property and transfer the property to the gaining Center in PP&E. The EMR for the equipment shall be deactivated as a "Transfer of GFE to a Contractor" to the succeeding contract. The supporting (shipping) documentation shall be approved by the Contracting Officer and coordinated by the IPO.

5.6.4 SHIPPED (TRANSFERRED) TO ANOTHER NASA CENTER

This process is used when Equipment Control receives notification that equipment needs to be transferred to another Center. GSFC is responsible for the EMR until the receiving Center takes ownership, including while it is in transit. Upon a receipt of the approved GSFC 20-4, Shipping Document, the GSFC Equipment Control Super User shall update the EMR in PP&E by completing a TC 65 updating the location to INTRANSIT and out-status (5) INTRANSIT. Wallops and NASA HQ shall forward all shippers to the GSFC Equipment Control Super User to process the transfer.

5.6.5 SHIPPED (TRANSFERRED) TO ANOTHER GOVERNMENT AGENCY

Upon a receipt of the approved GSFC 20-4, Shipping Document, Equipment Control shall update the EMR in PP&E by completing a Transfer to Other Government Agency, TC66 and

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adding the 4 digit Agency Code. The ECN and RFID tags should be removed from the equipment and affixed to the GSFC 20-4 prior to transfer. Wallops and NASA HQ shall forward all shippers to Equipment Control for processing.

5.7 EXCESSING IDLE EQUIPMENT

- 5.7.1 Controlled Equipment:** Property custodians and end users shall report controlled and administratively controlled equipment for excess via EQUIPMENT. EQUIPMENT sends the “request for excess” to DISPOSAL (Agency Disposal System) which automatically assigns an Excess Case Number for tracking labelling, pickup and generates a GSFC Transportation Pickup Request, GSFC 0129. A transaction TC90 is generated in PP&E to inactivate the controlled EMR. The GSFC 0129 documents for WFF will be mailed to their Disposal Office to affix the excess label and to deliver the item to their Excess Warehouse. The assigned warehouse locations will be annotated on the GSFC 0129 documents. The documents will be scanned and submitted to the Disposal Email Box **gsfc-05-disposal@mail.nasa.gov** for further processing at Greenbelt. The GSFC 0129 documents shall be mailed to the HQ Property Administrator to affix the excess label. The GSFC Transportation will pick up the excess equipment along with the 0129 documents on a daily basis.
- 5.7.2 Administratively Controlled Equipment via Delivery Ticket:** Some equipment and materials can be picked up by submitting an email to the Disposal Email Box **gsfc-05-disposal@mail.nasa.gov** due to poor condition, low acquisition value or low reutilization potential. A list of these items can be found on Attachment 14.

5.8 SURVEY ACTION FOR MISSING EQUIPMENT

- 5.8.1** A survey is an administrative action whereby the loss, damage, destruction, or theft of Government- owned equipment is documented, investigated, and reviewed for the purpose of adjusting GSFC’s property records and determining whether financial liability exists. A Report of Survey, NF 598 will be initiated immediately by the equipment user after discovery that Government property has been lost, damaged, destroyed, or stolen along with the GSFC Form 20-79, Survey Report Supplement. When theft is suspected, the user, supervisor, or property custodian will notify the Code 240 Center Security Office immediately. A copy of the Security Officer’s investigative report and finding shall become part of the Survey Report and the Survey Report Supplement when issued.
- 5.8.2 Preparing the Survey Report:** The equipment user or the individual who last had possession of the property shall prepare Part I of the survey report. After completion of Part I the equipment user or individual who last had possession of the property will submit the document to the division chief through the responsible property custodian. If the user and/or the individual who last had possession of the Government property are unknown or no longer a GSFC employee, it is the responsibility of the property custodian to complete Part I of the survey report. The division chief (or the next higher level of management if the GSFC employee is the division chief) will review the survey report(s) submitted by the user or the

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individual who last had possession of the Government property, specify in Part II the corrective action that is proposed or has been taken to prevent recurrence, sign Part II of the Survey Report, and forward it to the Code 273 Supply & Equipment Management Branch through the property custodian. (This includes survey reports initiated at WFF and NASA HQ.)

5.8.3 Processing the Survey Report:

- (1) Code 273 Supply & Equipment Management Branch shall maintain a Survey Report Register to track all survey reports by fiscal year including survey reports initiated at WFF and NASA HQ. Each report will be assigned a sequential number beginning with one (1) followed by the fiscal year date (i.e. S1-15) and entered in the register upon initial receipt. All documents pertaining to a survey report will be identified with the report number. The information on the survey report shall be verified for accuracy. Survey reports along with the supplement form will be submitted to the GSFC Property Survey Board and/or GSFC Property Survey Officer (PSO) for further investigation. (There is a separate Board and PSO for NASA HQ).
- (2) The Property Survey Board will hold monthly meetings as required to review and distribute all survey reports for board members to complete an investigation. Results of the investigation will be documented on the survey report by the board member, discussed at the next board meeting and signed by all board members present. All board actions will be documented in written minutes. These minutes will be in addition to the statements included in the survey reports and will constitute part of the investigation record.
- (3) The survey reports will be submitted to the Code 273 Supply & Equipment Management Branch to update the EMR record(s). For adequate internal control, a follow-up on the recommendations arising from the property survey process shall be completed.
- (4) A copy of all survey reports initiated on items valued at \$500,000 or more will be provided to the NASA Headquarters, Director Logistics Management Division.
- (5) Code 273 Supply & Equipment Management Branch shall deactivate the EMR in PP&E by completing a TC71 Deactivating due to inactive reason code 71, adding to EMR the Survey Reason Code, 1-4, Survey Report Number and Property Survey Board Recommendation 1 – 4.
- (6) Provide assistance to the SEMO as requested in completing the fiscal year reports listed below. Government property surveyed as lost or stolen but later found will be reinstated in PP&E (TC 19).
- (7) The Center Property Survey Officer, in conjunction with the Chairperson, Property Survey Board, and SEMO, shall ensure that feedback is provided to the Center Director via a written report at the end of each fiscal year. The report shall include:

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- (a) The total number of survey reports processed at the Center during the reporting period
 - (b) The total number of survey reports submitted by each directorate
 - (c) The acquisition cost, lost, damaged, destroyed and or the acquisition stolen Government Property
 - (d) The total number of employees held financially accountable for each directorate
 - (e) General information regarding significant actions, problems, or other matters of substance related to survey reports, including trends by organization, location, or equipment type
- (8) The Center SEMO shall submit to NASA HQ, Director, Logistics Management Division, a fiscal year report (due no later than 30 working days after September 30) containing the following data:
- (a) Number of Survey Reports initiated during the reporting period
 - (b) Reasons for the loss (examples: office move) damage, destruction, or theft
 - (c) Number of survey reports initiated due to physical inventories
 - (d) Total acquisition cost for Survey Reports initiated due to physical inventories
 - (e) Number of other Survey Reports during the period
 - (f) Total acquisition cost for other Survey Reports initiated during the period
 - (g) Total number of Survey Reports where employees were held financially accountable
 - (h) Total dollar amount where employees were held financially accountable
 - (i) Total number of Survey Reports where disciplinary action was taken

5.9 DECONTROL/ADJUSTMENTS

An equipment item may need to be decontrolled/deactivated for various reasons such as a lost tag, previously excessed, duplicate record, errors, or the item does not meet the criteria for controlling. The EMR in PP&E will be updated with a Decontrol TC 72, along with supporting documentation and the reason for decontrolling.

5.10 PP&E REPORTS

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Business Objects Management Report: allows Equipment Control to query PP&E for various types of specific information as listed below.

General Equipment Report: query using various fields against the Equipment Master and display the active Equipment Master data attributes

Inactive Equipment Report: query for Inactive or Deactivated Equipment that were deactivated

Center Borrow Report: query for active equipment records that were created in a Borrow status to another Center

Custodian/Custodian Account Report: query for active equipment records created

Lease/Loan in Expiration Report: query for active equipment records with a Leased In or Loaned In status and to limit the selection by the Lease/Loan expiration date

Out Status Expiration Report: query for active equipment records with a Loaned Out, Borrowed, Out for Repair or In Storage status and to limit the selection by the Out Status expiration date.

PP&E Transactions Report: query the change history for equipment during a specified period of time

Reutilization Report: allows Disposal and Logistics the ability to query inactive equipment records that have reutilization requests against them.

Transfers Report: to query for active equipment records for equipment that is in transit due to transfers to another Center.

NEMS History Report: is a static data report that allows the user to query using various fields against NEMS Equipment History from October 2002 – May 2008 prior to PP&E and EQUIPMENT.

NEMS Transactions Report is a static data report that allows the user to query the change history for equipment from October 2002 – May 2008 prior to PP&E and EQUIPMENT.

LIMS Data Report, Part I – Equipment Additions & Deletions: query the Equipment Master tables for equipment additions, deletions, and balances for a specific time period.

LIMS Data Report, Part II – Other Information: query the Equipment Master tables for equipment summary information as of the current date.

LIMS Equipment Data Report – Agency: will query the Equipment Master tables for equipment additions, deletions and balances for a specified period of time, after go-live. The LIMS Data Report-Agency will be run on the 30th of September of every fiscal year. This report is available on the b-ready portal under Information Delivery for Logistics Management Analysis Reports.

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Recovery Rate Report: query active equipment records, PP&E change log and inactive (historical NEMS) equipment records for equipment recovered from lost/surveyed status

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CHAPTER 6: INVENTORY MANAGEMENT

6.1 BACKGROUND

As an essential element of the GSFC and NASA HQ Equipment Management Programs, physical inventories provide a means for determining the completeness and accuracy of the equipment records in PP&E, reconciling and adjusting the equipment records in PP&E as required, assessing the effectiveness of equipment control procedures and operations and obtaining information needed for other aspects of equipment management, such as equipment utilization and repair. Per NPR 4200.1, an annual inventory shall be conducted by fiscal year.

6.2 OBJECTIVE

Physical inventories are designed to achieve the following objectives:

- (a) Verifying that recorded equipment is still on hand
- (b) Confirming or determining current user location and custodial responsibility for equipment
- (c) Identifying unrecorded equipment that qualifies for control
- (d) Locating or identifying missing equipment
- (e) Identifying obviously unused or underutilized equipment
- (f) Identifying equipment obviously in need of repair or rehabilitation

6.3 SCHEDULE

Queries are generated in PP&E to assist in developing the inventory schedule.

6.3.1 For Greenbelt, Equipment Control shall prepare an inventory schedule to include a wall-to-wall inventory consisting of all buildings divided into 6 Grids, with Grid 6 containing nearby off-site locations and submitted to the GSFC SEMO for approval.

6.3.2 For Wallops, inventories are conducted by property accounts; therefore, the schedules shall include the property account, property custodian, total items in the property account, and total acquisition cost, sorted by fiscal year quarters (October-December, January-March, April-June, July-September). Any future deviation of the approved schedules shall require concurrence from the GSFC SEMO. The WFF Equipment Control shall provide a weekly inventory status to the Logistics Contractor Equipment Branch Manager, GSFC SEMO, and Equipment Manager.

6.3.3 For NASA HQ, a separate annual inventory schedule for NASA Headquarters will be prepared and submitted to the HQ SEMO for approval to include the HQ floors and Points of

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Contact (POC) sorted by fiscal year quarters and all offsite locations. The HQ Property Administrator shall provide a weekly inventory status to the Logistics Contractor Equipment Branch Manager, HQ SEMO, and Equipment Manager.

6.4 PRE-INVENTORY ACTIONS

- 6.4.1** Opening of the Inventory Campaign: The Code 273 Equipment Manager shall open the inventory campaign (separate campaign for Greenbelt, Wallops & NASA HQ) in PP&E and notifies Equipment Control the inventory component has been opened (opens all property accounts) and provides the inventory campaign numbers which is assigned automatically by PP&E. The Inventory Campaigns will remain open until the end of the fiscal year when all controlled equipment in all buildings or property accounts have been scanned/inventoried in PP&E.
- 6.4.1.1** An Annual Property Walk-Through Inspection Form, GSFC Form 3-19, (Attachment 11) shall be included in an email to all Greenbelt Property Custodians regarding the start of the annual inventory in their buildings. Wallops and NASA HQ shall provide the Walk-Through Inspection Form during the Pre-Inventory Briefings. The Walk-Through Inspection Form should be completed prior to the start of the building or property account inventory. The NPR 4200.1. 3.6.5 states the inspection will include all locations both on-site and off-site for each property management area; identifying inactive or underused equipment that is no longer required or which is expected to become inactive in the near future, necessary maintenance is being performed as required, and reporting (via the form) equipment items no longer needed.
- 6.4.1.2** The inspection forms shall be signed by the property custodian and division chief and returned to Code 273.
- 6.4.2** Pre-Inventory Briefings shall be scheduled and presented to the division chief, directorate liaison, property custodian, facilities operations manager, and lab manager at Greenbelt, WFF & NASA HQ by the Code 279 Equipment Control in conjunction with the Code 273 Equipment Manager (and HQ SEMO for HQ). The briefings provides detailed steps with a timeline of the inventory process and an outline of the requirements to be completed by the organization to ensure a successful inventory. The briefing outlines the necessary measures for improving the Center inventory process, records management, and equipment accountability to minimize equipment misplacements that may result in equipment reported as lost. An inventory schedule is provided to all attendees.
- 6.4.3** Conducting the Inventory: At Greenbelt, the Annual Inventory will be conducted by dividing the Center buildings into 6 Grids. Code 273 Equipment Manager will notify all Greenbelt property custodians with equipment located in the building to be scanned/inventoried. The Inventory Team will systematically proceed to each room of the building to RFID scan and/or barcode scan all equipment items in the building. At WFF, the Annual Inventory will be conducted by property accounts. The Inventory Team will notify each property custodian in advance to schedule an appointment to complete the scanning of their property account(s). At

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NASA HQ, the Property Administrator will contact the appropriate POC(s) to complete the scanning on each floor.

6.4.4 Scanning: Using the iPhone and/or the RFID scanner, the Inventory Teams shall:

- (1) Scan each bar-coded tagged item in each room, or key in each bar-coded tagged item not able to scan
- (2) Tag, scan and prepare a FOS (NF1618) for each item identified without a bar-coded tag that meets the criteria for control.
- (3) Ensure that all equipment is identified with one of the following:
 - A NASA bar-coded tag
 - A Silver Decal (NF 1517 or 1517A)
 - Contractor-owned ID
 - Employee personal property ID
- (4) Continue interfacing with the property custodians, FOMS, Lab Managers and equipment users on a daily basis to ensure all scanning is completed in each room of each building.

6.4.5 Uploading Scanner Data: The iPhone scanners are automatically uploaded to PP&E for real time scanning of location and inventory date. For any RFID enrolling, the scanners will be uploaded to the Asset Tracking System. The Equipment Control Lead will complete a database sync and upload a bar file report to update PP&E with any RFID enrollments (future scans) and download a Tag Count Report to be sent to the NEACC Center to upload the PP&E database with RFID tag information.

6.4.6 Generating Inventory Campaign Reports:

The Equipment Control Lead will generate the:

- (1) ***PP&E Inventory Missing Item Report*** containing equipment items that could not be located during the inventory process.
- (2) ***PP&E Inventory Overage Report*** containing information about equipment that was physically scanned but is an inactive item in the system; it may be an active item owned by another NASA center, inactive due to designated as in out-coded status (See Out-coded Report), the equipment may have been controlled, previously surveyed, or GFE'd under a contract. Each item shall be researched by the Equipment Control to determine why it is inactive. This will determine the type of transaction required to clear the item.

- (3) ***PP&E Inventory In/ Out-Coded Report*** containing information about property recorded in PP&E as borrowed off center, on loan to an external organization (i.e. educational or federal), in storage or out for repair.

6.4.7 Reconciliation:

- (1) The property custodian reviews the reports, follows up on missing equipment and notifies the Inventory Team when equipment items are located.
- (2) The Inventory Team continues to work with the property custodian, updating the inventory as equipment items are located and sighted by the Inventory Team or discrepancies are resolved with proper supporting documentation.
- (3) The Inventory Team shall contact the owning Center to determine if the equipment is to be transferred or have the equipment returned for items that have an ECN number belonging to another NASA Center.
- (4) The Inventory Team will forward the PP&E Inventory Missing Item Report to the Code 273 Equipment Manager when there is no response from the property custodian.
- (5) The Equipment Manager, along with the Equipment Team Lead and the SEMO shall meet with the directorate liaison and or division chief to obtain necessary support in completing the reconciliation.
- (6) The Inventory Team shall ensure equipment found on station during the inventory that meets the criteria for control, is identified to the using organization, tagged, and recorded during the inventory using the FOS Investigation Report, (NF 1618). If the item does not meet criteria for tagging, the tag shall be removed, a Silver Decal (NF 1517 or NF1517a) shall be applied, and the tag register shall be updated.
- (7) The Inventory Team shall obtain a copy of supporting documentation from the property custodian for items not scanned, such as the Employee Property Pass Agreement, NF 892, the Loan of NASA Equipment, NF 893 or the Shipping Request, GSFC 20-4 for items that may have been shipped to a contractor, out for repair, or to support a GSFC project.
- (8) The property custodian or end user shall complete a Report of Survey, NF 598 for any items not located once an exhausted search has been completed. The survey report shall be forwarded to the Code 273 Supply & Equipment Management Branch to assign a survey number and add all required data to the Property Survey Register.
- (9) Code 273 shall ensure the EMRs in PP&E are changed from “active” to “inactive” by completing a TC 71. The original copy of the survey report is provided to the Property Survey Board for further investigation. (See 5.9). The Inventory Team prepares an “Inventory Statistical Summary Report” (Attachment 12), and is included as part of the official Inventory File.

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- (10) The Equipment Control's Branch Manager ensures a "Final Results Inventory Letter" is prepared (Sample –Attachment 13) for signature by the SEMO to each division chief detailing the results of the inventory such as: number of items located, number of items missing, division equipment loss rate (%), number of overages, and any other pertinent data.

6.4.8 Inventory Files: In addition to the overall inventory schedule, the Inventory Team shall establish and maintain an official inventory file for each property account. Each file should contain all necessary documents to clearly indicate the status and results of the inventory in each area.

Examples of documents to be included are:

- (a) Notification to the property custodian of the schedule for inventory
- (b) Designation of individuals responsible for taking the inventory
- (c) A listing of items in the property account at the beginning of the inventory
- (d) A copy of the Inventory Results Letter
- (e) Documents used to update the inventory date for un-scanned equipment

6.4.9 Closing the Inventory Campaign: Once it has been determined all buildings/property accounts have been inventoried, the Code 273 Equipment Manager will close the Center Annual Inventory Campaigns in PP&E. PP&E will automatically produce the Inventory Campaign Closure Reports that displays the Campaign Start and End Date, number of Bar Codes scanned, number of Bar Codes keyed, number of overrides and number of missing items.

Appendix A – Definitions

- A.1 Acquisition Method: The method by which the object was acquired by the Center; for example, receipt from purchase or receipt by transfer; the acquisition methods are now an attribute not a transaction.
- A.2 Administratively Controlled Equipment - NASA equipment having an acquisition cost of less than \$5,000 that is managed using local procedures established by the SEMO to ensure property accountability and prevent fraud, waste and misuse. This category excludes sensitive items, and items identified for display in the NASA Exhibits Loan Program, which are required to be tracked in the PP&E system.
- A.3 Assembly Item - An item without which the basic unit of equipment cannot operate, such as motors for pumps and machine tools.
- A.4 Asset Master Record: A record in PP&E that identifies and stores all data for an asset; commonly referred to as an AMR. An AMR will exist for all Capital Equipment.
- A.5 Calibration - The process of determining the deviation from a standard so as to ascertain the proper correction factors for measuring instruments.
- A.6 Cannibalization - The removal of serviceable parts, components, or assemblies from one piece of equipment to be used as replacement in other equipment or to fabricate another item.
- A.7 Capital Equipment - An item of equipment with an acquisition cost of \$500,000 or more that has an estimated service life of two years or more, that shall not be consumed or expended and that most generally shall be identified as an independently operable item identified with an AMR.
- A.8 Condition Code (CC) - A code assigned to indicate the physical condition and usability of equipment.
- A.9 Constructed Display Items – There are instances in which Display Items are constructed for temporary display and later disassembled for reutilization in a different project. In this instance, constructed items shall not be recorded in the PP&E system.
- A.10 Contract Number - A unique identifier assigned to each NASA Contract, pursuant to the NASA FAR Supplement 1804-7102.
- A.11 Contracting Officer (CO) - Any person with the authority to enter into and administer contracts and make determinations and findings with respect thereto, or with any part of such authority.
- A.12 Contracting Officer's Representative (COR) - An authorized representative of a Contracting Officer acting within the limits of their authority.
- A.13 Contractor-Acquired Equipment – Equipment procured or otherwise provided by the contractor for the performance of a contract, title to which is vested in the government.
- A.14 Controlled Equipment - All equipment that has an acquisition cost of \$5,000 or more, that has an estimated service life of two years or more or that shall not be consumed or expended. Also includes selected items of equipment with an acquisition cost of less than \$5,000 designated and identified as sensitive by the Center.
- A.15 Directorate Liaisons – The key individual appointed by the Director Of to serve as a liaison between the Director Of, the directorate's property custodians, and the Supply & Equipment Management Branch, to ensure all property management issues are resolved in a timely manner.
- A.16 Equipment - An item of real or installation property generally in the configuration of a mechanical, electrical, or electronic apparatus or tool, normally costing in excess of \$500, which may perform a function independently or in conjunction with other equipment or components.

- A.17 Equipment Category: Identifies the kind or type of equipment: controlled or administratively controlled.
- A.18 Equipment Control Number (ECN) - The identification number assigned and affixed to each item of equipment for control purposes using a bar code tag or decal.
- A.19 Equipment Master Record – A record in PP&E that identifies and stores all data for a piece of equipment, commonly referred to as an EMR.
- A.20 Excess Turn In - Personal property determined unnecessary to the need and discharge of the holding organization and therefore turned into the Property Disposal Officer for reutilization or disposal.
- A.21 Exhibit/Display – NASA property that, regardless of acquisition cost, that because of its significance (e.g., artifact designation, sensitive status, or equipment controlled value exceeding 5K) has been identified for display at a Center, or as a rotational exhibit item in the NASA Exhibits Loan Program. These do not include banners, display cabinets, or expendable category items.
- A.22 Fabricated Item – Personal property, which is designed and manufactured or assembled as a result of work orders, cannibalization, or other similar methods.
- A.23 Federal Supply Class - A four-digit property identification code describing commodity classification. See Federal Cataloging Handbooks H2 series.
- A.24 Found on Station (FOS) - Any equipment meeting the criteria for control for which formal accountability has not been established.
- A.25 Government Bill of Lading (GBL) – A receipt issued by the Government that lists goods shipped.
- A.26 Government Furnished Equipment (GFE) - Equipment in the possession of, or directly acquired by, the Government and subsequently made available to the contractor.
- A.27 Heritage Asset – Equipment of historical and natural significance; or of cultural, education or artistic (e.g. aesthetic) importance; or has significant architectural characteristics.
- A.28 Industrial Property Officer (IPO) - The IPO is the individual designated by the Center Director to manage and coordinate Center property matters among the various contracting officers, technical officials, contractor officials, delegated government property administrators, and plant clearance officers.
- A.29 Leased Equipment - Equipment that has been conveyed by or to NASA by contract for a certain time period in consideration of payment or rental fee.
- A.30 Loaned Equipment - Equipment in temporary use by other than the accountable organization.
- A.31 Maintenance and Repair of Equipment - Recurring day-to-day, periodic, or scheduled activity required to keep equipment in working condition, or to resolve it or its components to a condition equivalent to its original designed capacity and efficiency.
- A.32 Modification - A basic or functional change made to an equipment item to give a new orientation, or to serve a new purpose.
- A.33 NASA Federal Acquisition Regulation (FAR) Supplement - A document along with the Federal Acquisition Regulation (Federal Acquisition Regulation), establishes uniform policies and procedures relating to the procurement of property and services. The NASA Federal Acquisition Regulation Supplement applies to all purchases and contracts made by NASA for property and service which obligate appropriated funds.
- A.34 Personal Property - Property of any kind, including equipment, materials, and supplies, but excluding real property.

- A.35 Plant Clearance – All actions related to the screening, redistribution, and disposal of contractor inventory from a contractor’s plant or work site. Contractor’s plant includes a government facility when it is contractor-operated.
- A.36 Property Custodian - An individual appointed by the Division Chief who is responsible for the controlled equipment assigned to the organization.
- A.37 Property Disposal Officer (PDO) – The government official appointed by the Center Director responsible for managing the Center’s screening, redistribution, and disposal functions.
- A.38 Property Survey Board – Established by the Center Director for a specific term, composed of members representing each directorate, with alternates as appropriate, and a chairperson that shall investigate and make recommendations concerning the loss, damage, or destruction of property.
- A.39 Property Survey Officer (PSO) - Appointed by the Center Director for a specific term, with the authority to approve all survey reports and investigate survey reports not handled by the Property Survey Board.
- A.40 Purchase Request (PR) or Purchase Order (PO) - A document utilized to state requirement for, and to authorize purchase of, goods and services.
- A.41 Radio Frequency Identification tags (RFID) – passive bar code tag that can be scanned by a special scanner that transmits signal to the room and “wakes up” the RFID tag. Signal bounces back, informing the scanner the equipment is in the room.
- A.42 Rolling Stock – Any item that regardless of its acquisition cost is subject to the assignment of a NASA license plate. An ECN shall be assigned to the equipment and the equipment added to the PP&E system prior to the assignment of a NASA license plate.
- A.43 Sensitive Item - An item of equipment that, due to its pilferable nature or the possibility of it being a hazard, requires a stringent degree of control. Sensitive items can be capital or non-capital equipment and are controlled at \$500 except for models/displays, tablets, safes and weapons, which are controlled regardless of cost.
- A.44 Supply & Equipment Management Officer (SEMO) – A government official, appointed by the Center Director, responsible for providing functional management and leadership in the implementation of an effective equipment and supply program.
- A.45 Survey Report - A report of administrative action taken to investigate and review the loss, damage, or destruction of Government property and to assemble pertinent facts and determine the extent of such loss, damage, or destruction.

Appendix B – Acronyms

AMR – Asset Master Record (component in PP&E)
BOBJ - Business Objects Analysis
CO – Contracting Officer
COR – Contracting Officer’s Representative
DRMS – Defense Reutilization and Marketing Services
DISPOSAL – Agency Disposal System
ECN – Equipment Control Number
EMR – Equipment Master Record (component in PP&E)
EQUIPMENT - NASA Web Front-End
FOM – Facility Operations Manager
FOS – Found On Station
GLTI – Goddard Logistics Technical Information
HQ - Headquarters
IAM – Integrated Asset Management
IPO – Industrial Property Officer
M/N – Model Number
MFR – Manufacturer
MOA – Memorandum of Agreement
NASA – National Aeronautics and Space Administration
NEACC – NASA Enterprise Applications Competency Center
OCC – Office of Chief Counsel
OGC – Office of General Counsel
OIIR – Office of International and Interagency Relations
PDO – Property Disposal Officer
PO – Purchase Order
POC – Points of Contact
PM – Performance Metric
PP&E – Property Plant and Equipment
PSO – Property Survey Officer
QC – Quality Control
RFID - Radio Frequency Identification
SEMO – Supply and Equipment Management Officer
SIMS – Storage Information Management System
SOW – Statement of Work
TID – Tag-In-Division
WFF- Wallops Flight Facility
WI – Work Instruction
WITS- Work Information Tracking System
WSC – White Sands Complex

DIRECTIVE NO. 270-WI-4200.0.2

EFFECTIVE DATE: 08/05/2015

EXPIRATION DATE: 08/05/2020

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ATTACHMENT 1: DD Form 1419 - DOD Industrial Plant Equipment Requisition

DOD INDUSTRIAL PLANT EQUIPMENT REQUISITION		REQUISITION NUMBER	Form Approved GSA GEN. REG. NO. 270-02-0008 Expires Feb 28, 2008
<small>The public reporting burden for this collection of information is estimated to average 1.5 hours per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing the burden, to Department of Defense, Washington Headquarters Services, Directorate for Information Operations and Security (2024-0248), 1215 Jefferson Davis Highway, Suite 1204, Arlington, VA 22202-4302. Respondents should be aware that notwithstanding any other provision of law, no person shall be subject to any penalty for failing to comply with a collection of information if it does not display a currently valid OMB control number.</small>			
PLEASE DO NOT RETURN YOUR FORM TO THIS ADDRESS. RETURN COMPLETED FORM TO DEFENSE SUPPLY CENTER RICHMOND, ATTN: JH, 8000 JEFFERSON DAVIS HIGHWAY, RICHMOND, VA 23297-5100			
SECTION I - ITEM DESCRIPTION			
1. COMMODITY CODE	2. MANUFACTURER	3. MODEL NUMBER	
4. STOCK NUMBER	5. POWER CODE	6. ESTIMATED COST	7. PHYSICAL INSPECTION REQUIRED () YES NO
8. DESCRIPTION		9. PRECISEMENT SPECIFICATION ATTACHED () YES NO	
CONTINUED UNDER REMARKS SECTION () YES () NO			
SECTION II - ROUTING AGENCY/FACILITY/CONTRACTOR			
10. NAME AND ADDRESS (Include ZIP Code)	11. CONTRACT NUMBER	12. DATE (YYYYMMDD)	13. COMMAND CODE
14. PROGRAM (If one)			
15. INTENDED USE			
16. DATE ITEM REQUIRED AT DESTINATION (YYYYMMDD)			
17. DATE CERT. N/A REQUIRED (YYYYMMDD)			
18. PRIORITY			
19. BASIS FOR AUTHORIZATION (If one)			
20. PROCUREMENT PLANNED (If one)			
21. REBUILD/OVERHAUL CANDIDATE			
22. TYPED NAME AND TITLE OF REQUESTING OFFICIAL			
23. SIGNATURE OF REQUESTING OFFICIAL			
24. DATE (YYYYMMDD)			
25. CERTIFICATION OF NEED BY ADMINISTERING ACTIVITY			
26. NAME AND ADDRESS (Include ZIP Code)			
27. TYPED NAME AND SIGNATURE OF PRODUCTION REPRESENTATIVE			
28. DATE (YYYYMMDD)			
29. SIGNATURE OF ADMIN. CONTRACTING OFFICER			
30. DATE (YYYYMMDD)			
SECTION III - APPROVAL AUTHORITY			
31. TITLE, SYMBOL, AND TELEPHONE NO. OF APPROVING OFFICIAL			
32. TYPED NAME AND SIGNATURE OF APPROVING OFFICIAL			
33. DATE (YYYYMMDD)			
SECTION IV - ALLOCATION AND AUTHORITY TO INSPECT (To be completed by DSCR)			
34. I.D./GOVERNMENT TAG NUMBER			
35. DESCRIPTION (See attached copy of DD Form 1342, detail)			
36. PRESENT LOCATION (Name, address and ZIP Code)			
37. SHIPPED TO (Name, address and ZIP Code)			
38. ESTIMATED TIME REQUIRED FOR SHIPMENT FROM DATE OF ACCEPTANCE (Enter number of days)			
39. AS IS CONDITION			
40. TEST REQUIRED			
41. REPAIR REQUIRED			
42. REPAIR/OVERHAUL REQUIRED			
43. STANDARD ATTACHMENTS REQUIRED			
44. TYPED NAME AND SIGNATURE OF ALLOCATING OFFICIAL			
45. DATE (YYYYMMDD)			
46. DATE OFFER EXPIRES (YYYYMMDD)			
SECTION V - NON AVAILABILITY CERTIFICATE (To be completed by DSCR)			
47. The item described in Section I of this form has been screened by DSCR against the title inventory of the Department of Defense and it is hereby certified as not available or cannot be delivered on or before the date specified in Section II (Item 16). Procurement action resulting from this Certification of Non-Availability must be initiated within 45 calendar days of the date included in this Section (Item 42) or complete reprocurement is required. Equipment offered by DSCR in Section IV must be considered if the supplier cannot deliver new equipment before expiration of the period specified in Section IV (Item 38).			
48. TYPED NAME AND SIGNATURE OF CERTIFYING OFFICIAL			
49. DATE CERTIFICATE ISSUED (YYYYMMDD)			
50. DATE CERTIFICATE EXPIRES (YYYYMMDD)			
51. CERTIFICATE NUMBER			

DD FORM 1419, JUN 2003

PREVIOUS EDITION IS OBSOLETE.

SECTION VI - CERTIFICATE OF ACCEPTANCE	
44. THE ITEM ALLOCATED IN SECTION IV OF THIS FORM (X as applicable)	
a. HAS BEEN PHYSICALLY INSPECTED AND IS ACCEPTABLE	
b. IS ACCEPTABLE WITHOUT PHYSICAL INSPECTION	
c. IS ACCEPTED UNDER ONE OF THESE CONDITIONS:	
(1) AS IS CONDITION	(2) REPAIR REQUIRED
(3) TEST REQUIRED	(4) REBUILD/OVERHAUL REQUIRED
(5) OTHER	
d. IS NOT ACCEPTABLE (A complete description of conditions making item unacceptable must be stated under REMARKS below)	
45. TYPED NAME AND TITLE OF CERTIFYING OFFICIAL	46. SIGNATURE OF CERTIFYING OFFICIAL
47. DATE (YYYYMMDD)	
SECTION VII - SPECIAL SHIPPING INSTRUCTIONS	
48. SHIP TO (Include ZIP Code)	49. FOR TRANSHIPMENT TO (Include ZIP Code)
50. MARK FOR	
51. APPROPRIATION CHARGEABLE FOR	
52. PAYING OFFICE/ACTIVITY NAME AND ADDRESS (Include ZIP Code)	
a. PACKING-CRATING-HANDLING	
b. TRANSPORTATION	
c. OTHER	
53. SPECIAL DISTRIBUTION OF SHIPPING DOCUMENTS AND OTHER INSTRUCTIONS	
SECTION VIII - REMARKS	
54. REMARKS	

DD FORM 1419 (BACK), JUN 2003

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ATTACHMENT 2:**EQUIPMENT MEETING THE TAGGING CRITERIA**
GSFC/WFF/HQ

- **All equipment items with an acquisition value @ \$5,000 or more**
 - Capital Items - \$500,000 or more with no alternative future use
- **Sensitive Items as listed below** (per NPR 4200.1G)
- **Exhibit and Display Items** (regardless of acquisition value – per NPD 4200.1C)
- **Safes** (all types – added per Security)
- **Rolling Stock** (items requiring a NASA vehicle tag – per NPD 4200.1C)
- **Shipping Containers** (specialized – per NPD 4200.1C)

SENSITIVE ITEMS LIST:**Items, regardless of acquisition value:**

- 1) WEAPONS, all types including, but not limited to, air, spring, powder, or other propulsions system.
- 2) HAZARDOUS DEVICES, including environmentally hazardous devices. (Example: Breathing apparatus, portable x-ray, Defibrillator, etc.
- 3) Tablets, Mini Laptops, Smartphones, or other Computing Device

Items with an acquisition value of \$500 or more:

- 1) AUTOMATED DATA PROCESSING EQUIPMENT (ADPE), which includes the following:
 - a. Computers, all microcomputers, personal computers, including desktop systems, workstations, laptops, notebooks, handheld computers (palms), and other portables, but excluding mainframes.
 - b. External Computer Peripherals, including:
 - a. Printers.
 - b. Disk Drives, (Fixed and Removable Media). (Zip Drives included)
 - c. Tape Drives. (Magnetic, etc.)
 - d. CD and DVD Drives.
 - e. Scanners. (Optical Reader, Data Entry included)
 - f. Monitors. (Display Units for Computers only)
 - g. Terminals.
- 2) Cameras, all types.
- 3) Recorders and Players, including, but not limited to digital, laser, cassette, and reel to reel.
- 4) Radios.
- 5) Receivers. (Global Positioning System – GPS included)
- 6) Transceivers.
- 7) Televisions.
- 8) Shuttle Tiles.

EQUIPMENT THAT DOES NOT MEET THE TAGGING CRITERIA NEEDS TO HAVE “Property of U.S. Government” Decal, NF 1517 or 1517A and Tracked as Non-Controlled property by Property Custodian or Organization

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ATTACHMENT 3: RECEIVING TAG LOG

[illegible]

ATTACHMENT 4: Equipment Management Tags and Labels

Equipment Management Tags and Labels

Controlled equipment has a visible bar coded tag affixed to the equipment. Standard bar coded tags are black on silver aluminum. If a controlled equipment item is very small, a “mini” tag is used. These tags are black on silver aluminum.



Administratively controlled equipment is equipment (not designated as sensitive) which has an acquisition cost of less than \$5,000. This type of equipment is to be affixed with a “Property of U.S. Government” decal, NASA Form 1517 (standard size) or NASA Form 1517a (mini size), except when not physically or technologically feasible (as with optics, test models, etc.).



Controlled equipment must also be tagged with a passive RFID (radio-frequency identification) tag. The tags will range in size depending on the equipment item size that is being tagged.





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ATTACHMENT 5: PP&E LOADSHEET

 SAP PP&E LOADSHEET <i>(IE01-Equipment Master Record)</i>		INITIALS:		ITEM NAME CODE
(ECN Number) EQUIPMENT:		INTERNAL NOTE 		-
(Select From Drop Down List) EQUIPMENT CATEGORY:		"ITEM NAME DETAILS" DISPLAYED IN AREA BELOW		
(Select From Drop Down List) SUBINSTALL:	-	EQUIPMENT STATUS:	AVLB	
(Select From Drop Down List) APPROVED ITEM NAME:	-			
(MANUAL USER INPUT) ITEM NAME:				
(\$) ACQUISITION VALUE:		ACQUISITION DATE: (MM/DD/YYYY)	-	
<small>(ACQUISITION Value Includes: All included Components, Transportation, Handling, SEWP fees & Shipping Charges; Any Discounts are deducted; These Additional Costs to be Shared Equally among all items tagged on purchase document)</small>				
(Auto-Fill Area) MFR. CODE:	-	(Select From Drop Down List) MANUFACTURER NAME:	-	
(User Input) MFR. CODE:		(User Input) MANUFACTURER NAME:		
CONST.YEAR / MONTH : (YYYY / MM) :		ADDRESS, CITY:		
MODEL NUMBER:		STATE, ZIP CODE:		
SERIAL NUMBER:		TELEPHONE:		
(GSFC/WFF/HQ Drop Down Table) BUILDING NUMBER:	-	(Auto-Fill Area) BUILDING DESCRIPTION		
(Incl Center Prefix XX-XXXX) (User Input) BUILDING NUMBER:		ROOM NUMBER:	-	
(Drop Down Table) ACQUISITION METHOD:	-	ACQUISITION METHOD DESCRIPTION:	-	
(Use Valid # if Capital Equipment) PO/CONTRACT NUMBER		(Available from PO) LINE ITEM NUMBER		
(Auto-Fill Credit Card Area) REFERENCE NUMBER:	-	(Auto-Fill Area) FSC CODE:	-	
(User Input) REFERENCE NUMBER:		(User Input) FSC CODE:		Manufacturers Address from Table If Available (AutoFill Area Below)
CUSTODIAN ACCOUNT NUMBER:		PROPERTY CUSTODIAN NAME:		-
END USER NUMBER:		END USER NAME:		(Click Here For Credit Card List) GSFC/WFF CARDHOLDER NAME:
SAP "FLAGS" TAB	HIGH RISK FLAG NOTICE WHEN ITEM IS SENSITIVE	MISCELLANEOUS TAB		Maximum Credit Card Dollar Value
<input type="checkbox"/> INVENTORY FLAG	Non-Sensitive	(Auto-Fill OGA Code) OTHER GOVT. AGENCY:	-	CardHolder \$ Limit
<input type="checkbox"/> HIGH RISK FLAG		CONTRACT RECEIVER		Click Here to Search For Government Agency Code (OGA)
<input type="checkbox"/> UNATTACHED FLAG		LOCAL DATA		
<input type="checkbox"/> SPACE FLIGHT INDICATOR	REVIEW & CHECK ADDITIONAL FLAGS WHERE APPLICABLE			
<input type="checkbox"/> NASA EXHIBIT ITEM				
<input type="checkbox"/> NASA GIFTED ITEM				
<input type="checkbox"/> ATTACHMENT FLAG				

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ATTACHMENT 6:

RESEARCH SHEET

INITIALS _____

ECN _____

DATE: _____

Reason For Extended Research

- ☐ To Cataloger for Item Name ☐ Need Supporting Documentation
☐ To Cataloger for FSC ☐ Verification of Credit Card Holder
☐ Manufacturer Cage Code Research (Add)
☐ Account Code Does Not Exist ☐ Pending Customer Response
☐ Verifying Replacement ECN ☐ Other

Date

Action(s)

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

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ATTACHMENT 7: TAG IN DIVISION (TID) LOAD SHEET

ECN # _____ (WRITE ECN ONTO PURCHASE DOCUMENTS)
LINE ITEM #(S) _____ (LIST ALL LINE ITEMS NUMBERS USED TO DETERMINE COST IN THE COMMENT FIELD ON <i>CHIRPS</i> OR ITEM NUMBER FIELD ON <i>LOADSHEET</i>)
ITEM NAME _____ (FROM DROP DOWN LIST, ASK USER OR PC, CHECK LIKE M/N IN NEMS OR ON THE INTERNET; CHECK WITH CATALOGER)
COST _____ INCLUDE: SHIPPING / SHIP INSURANCE - PRO-RATE AMONGST <u>DELIVERED</u> TAGGABLE ITEMS SOFTWARE - "NOT C.O.T.S. = MS OFFICE, ETC" INSTALLED EQUIPMENT = MEMORY, DRIVES, ETC. SYSTEMS - DEDUCT COST OF ITEMS BELOW DOLLAR AMOUNT CHECK AS ESTIMATE "Y" INSTALLATION, TRAINING, SEWP FEE - PRO-RATE AMONGST TAGGABLE ITEMS DEDUCT: DISCOUNTS - PRO-RATE AMONST TAGGED ITEMS; *DO NOT INCL.: MAINTAINANCE, WARRENTY OR LICENCE FEE'S
DATE ACQ _____ (SHIPPING DATE RECEIVED OR DATE CODE ACCEPTED EQUIPMENT "ASK USER")
ACQ DOC # _____ (PO #, CONTRACTOR #, CC #, TRANSFER #)
MFR _____ (FROM DATA PLATE ON EQUIPMENT)
M/N _____ (FROM DATA PLATE ON EQUIPMENT)
S/N _____ (FROM DATA PLATE ON EQUIPMENT)
YEAR MFG _____ (FROM DATA PLATE ON EQUIPMENT)
CUST ACCOUNT # _____
USER _____
BLDG _____
ROOM _____
FSC CODE _____
INITIAL _____ DATE TAGGED _____
CHECK DOCUMENTS FOR proper signatures (FOS, Cannibalization -Modification, Fabrication forms, shippers etc.)
TIME STAMP ALL TRANSACTIONS

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(11/09)

ATTACHMENT 8:

Acquisition Methods in the NASA PP&E System

E.1 The following is the drop down table that is displayed with the match code icon for the Acquisition Method:

If Receipt is	Then Select
Purchase by NASA	01 - Receipt by Purchase - NASA funded
Purchase by another Government Agency on behalf of NASA	02 - Receipt by Purchase - OGA Funded
Transfer from a NASA Installation	04 - Receipt by Transfer - From NASA Installation
Transfer from another Government Agency	05 - Receipt by Transfer - From OGA
Transfer from a Contractor	06 - Receipt by Transfer - From Contractor
Lease in	08 - Receipt from Lease In
Loan in	09 - Receipt from Loan In
Fabrication	10 - Receipt from Fabrication
Assembly or Disassembly Example: An item that has to be assembled.	11 - Receipt from Assembly/Disassembly
Found on Station	12 - Receipt from Found on Station
Excess	13 - Receipt from Excess
Retagging	14 - Receipt from Retagging
Transfer of Real to Personal Property	16 - Receipt from Transfer of Real to Personal Property
Non-Government source Example: Unsolicited equipment, donation	17 - Receipt from Non-Government Source
Not previously meeting criteria for tagging Example: An item that did not meet the criteria for being tagged, but now does.	18 - Receipt from Not Previously Meeting Criteria for Tagging
Reinstating item previously surveyed Example: The equipment was lost, stolen, missing, etc. and then found.	19 - Receipt from Reinstating Item Previously Surveyed
Lease to a purchase Example: The equipment was leased and during the lease term, it was decided to purchase the equipment.	21 - Receipt Resulting from Conversion of Lease to Purchase
Sent for Repair and Replaced by Vendor	22 - Receipt from Replacement from Vendor

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ATTACHMENT 9:

Deactivation in the NASA PP&E System

If Reason Was	Then Select
Transfer equipment to another Government Agency	66 - <u>Transfer to Other Government Agency</u> ⚠ If this Inactive Reason Code is used then the Other Govt Agency field is required on the Change Equipment: NASA Data - Miscellaneous sub tab.
Transfer of GFE to a Contractor	67 - <u>Transfer of GFE to a Contractor</u> ⚠ If this Inactive Reason Code is used then the Contract Rec. field is required on the Change Equipment: NASA Data - Miscellaneous sub tab.
Return equipment that has been leased in	69 - <u>Lease In – returned</u> ⚠ If this Inactive Reason Code is used then the Lease/Loan Return Date field is required on the Change Equipment: NASA Data - In Status sub tab.
Return equipment that has been loaned in	70 - <u>Loan in – returned</u> ⚠ If this Inactive Reason Code is used then the Lease/Loan Return Date field is required on the Change Equipment: NASA Data - In Status sub tab.
Account for equipment that is missing	71 - <u>Survey (Missing Equipment)</u> ⚠ If this Inactive Reason Code is used then the Survey Reason Code and Survey Report Number fields are required on the Change Equipment: NASA Data - Codes sub tab.
Decontrol a piece of equipment	72 - <u>Decontrol (Removal of Tag)</u>
Deactivate a record due to assembly/disassembly of equipment	73 - <u>Delete Resulting from Assembly / Disassembly</u>
Retag a piece of equipment	74 - <u>Delete from Retag</u> ⚠ After the current piece of equipment has been deactivated; follow the process below for Retagging. 1. Create a new EMR (execute T-code IE01), and reference the retagged ECN using the <i>Create with Reference</i> feature. See the EUP <i>Create an Equipment Master Record</i> . 2. On the new EMR, select 14 - Receipt from Retagging in the Acquisition Method field and enter the retagged ECN into the Previous ECN field.
Trade-in equipment	85 - <u>Delete Resulting from Trade-In</u>
Transfer equipment to real property	86 - <u>Transfer to Real Property</u>
Excess equipment	90 – <u>Excess</u> ⚠ If this Inactive Reason Code is used then the Initiator Number and Disposal Condition fields are required on the <i>Change Equipment: NASA Data - Disposal</i> sub tab.
Space Shuttle property leaving NASA	91 – Dispositioned by SSP AWG
Repair Item Replaced by Vendor	92 – Delete resulting from Replacement by Vendor
Property launched into Orbit, to be expended in Space	93 – Destroyed in Orbit

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ATTACHMENT 10: CANNIBALIZATION/MODIFICATION ROUTING SLIP

Mail Code	Name	Action	
273	Equipment Manager	Approval	x
		Call Me	
273	SEMO	Concurrence	
		File	
279	Equipment Control	Information	
		Investigate and Advise	
		Note and Forward	
		Note and Return	
		Per Request	
		Per Phone Conversation	
		Recommendation	
		See Me	
		Signature	x
		Circulate and Destroy	

For your review and approval:

Process Transaction Code (TC) for ECN _____

Increase/Decrease \$_____ (Amount)

From: \$_____ (Original) TO: \$_____ (New Value)

A copy of the cannibalization/modification will be forwarded to the property custodian.

Name	Ext.
Code	Date

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ATTACHMENT 11: GSFC Form 20-78

Annual Property Walk Through Inspection		
Property Accounts		
Idle Equipment Identified to be excessed:		
ECN	Item Name	Acquisition Value
Idle Equipment Identified to be reutilized within:		
ECN	Item Name	Acquisition Value
I certify that the Annual Walk Through Inspection, required by FPMR Section 101-43.101; U.S.C. Section 524(a) 2 and NPR 4200.1G 3.6.5 has been completed for the above listed property management areas.		
Property Custodian Printed Name	Property Custodian Signature	Date
Division Chief or Designee Printed Name	Division Chief or Designee Signature	Date

Upon Completion, please return to Code 273/Kevin Roberts

GSFC 20-78 (6/2013) Previous Editions Are Obsolete

NRRS 4/12C

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Attachment 12:

***ANNUAL INVENTORY SUMMARY REPORT
FOR FINAL RESULT LETTER TO DIVISION CHIEF***

<i>Property Custodian:</i>	<i>Property Account:</i>
<i>Inventory Start Date:</i>	<i>Inventory Completion Date:</i>

<i>DATA</i>	<i>ITEMS</i>	<i>ACQUISITION VALUE</i>
Total of Recorded Items in Property Account		
Total of Recorded Items SCANNED in Property Account		
Total of Recorded Items NOT SCANNED in Property Account (Missing/Surveyed)		
Total of Unrecorded Items FOUND ON STATION (FOS)		

<i>Additional Comments:</i>

<i>Inventory Manager Signature:</i>	<i>Date:</i>

Revised April 2015

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Attachment 13: SAMPLE: Annual Equipment Inventory Final Result Letter to Division Chief

October 15, 2015

273

TO: 990/XXXX Division

FROM: 273/Supply and Equipment Management Officer (SEMO)

SUBJECT: Final Results of the FY 15 Annual Equipment Inventory

REFERENCE: NPR 4200.1G, NASA Equipment Management Procedural Requirements

The annual inventory for the Code 990 Division was completed as of September 30, 2015. Code 990 had a total of 1,699 items with an acquisition value of \$93.9M to be inventoried. There were four (4) items with a total acquisition value of \$24,495 surveyed as missing as a result of this inventory, which equates to a 0.23 percent loss rate. Please note the equipment loss-rate standard for the Agency is 0.5 percent.

Accountability of these items is a joint effort between the organization's employees and their property custodians. The employees have the responsibility to keep those items assigned to them safe and secure. Property custodians are responsible for keeping records up to date and notifying the Code 279 Equipment Control of any status changes to the equipment within their organization.

To maintain equipment accountability in the future, you are encouraged to implement the "best practices" as listed below:

- Ensure all employees maintain a sign-out log in labs where there is shared equipment. Ensure all labs have a lock and entrance is restricted to authorize employees only, if feasible. In addition, all lab employees should be instructed to lock the lab when departing.
- Create an environment whereby each employee is aware of their responsibility for equipment assigned to them.
- Ensure equipment users support their property custodian in all property management activities (i.e. transfers, location changes, equipment losses, no longer having a need for the equipment assigned to them, or when exiting the Center).
- Ensure all equipment users validate and sign for the equipment items assigned to them.
- Ensure the required Annual Equipment Walk-Through Inspection per NPR 4200.1G, Paragraph 1.1.6 is conducted to identify idle (unused) equipment for potential excessing and review the labs' sign out logs and security procedures to ensure shared equipment is being tracked adequately.
- Ensure all non-controlled equipment is affixed with a "Property of U.S. government" decal, NF 1517 or 1517A and that your division is tracking non-controlled equipment with appropriate documentation after receipt, per NPR 4200.1G, Paragraph 3.1.3.

If you have any questions, please contact me at extension 6-7644.

Sara Jensen-Brooks

cc:

273/J. Cronise

279/C. Higgs

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ATTACHMENT 14: NON-NASA TAGGED ITEMS - EXCESS PICKUP TICKET PROCESS


Item Name/Description	Item Name/Description
BUS EXTENDERS	POWER SUPPLIES (small office power supplies)
CALCULATORS (manual and electronic)	PROJECTOR SCREENS
CARD CAGE (EMPTY ONLY)	RACK MOUNT MUFFIN FANS
CARDS (such as N/C, P/C, Circuit) ***if contains data contact disposal.	RACKS (EMPTY RACKS ONLY or RACK PIECES)
CHASSIS (EMPTY ONLY)	REFRIDGERATOR
COMPUTER ACCESSORIES (such as mice, keyboards, keyboard trays, speakers, software etc...)	SCALE
CONNECTORS	SHEET FEEDER-SETUP
DOCKING STATIONS (such as bookends)	SHREDDERS
FANS (office)	SPACE HEATERS
FURNITURE (such as desks, file cabinets, etc...)	STANDS (such as microscopes, oscilloscopes, camera)
LAPTOP BATTERIES	TYPEWRITER
LENS (such as cameras)	UNINTERRUPTABLE POWER SUPPLY (Small only)
MICROWAVES (kitchen)	VACUUMS (such as office/wet dry)
OFFICE SUPPLIES (any)	VIEWGRAPHS
OVERHEAD PROJECTORS	WEBCAM CAMERAS
<p align="center">*****VERY IMPORTANT*****</p> <p>Please contact the Disposal Office for further assistance if the item you are excessing: (1) has an ECN, to ensure it is no longer active, (2) has an acquisition cost of \$400 or more, (3) is rack mountable, (4) contains digital media data, or (5) if you are excessing any of these items in bulk. (6) if the item you are excessing is considered equipment.</p> <p>Submit your requests to the Disposal Email Box: GSFC-05-Disposal@mail.nasa.gov</p>	
<p><i>Revised as of 10-17-12</i></p>	

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Attachment 15: NASA Form 1739

Capitalization Determination Form (CDF)

 National Aeronautics and Space Administration

NASA Projects
Alternative Future Use Questionnaire

SECTION I - Projects Under 7120.5D and 7120.X

As part of NASA's efforts to appropriately account for its assets and its expenses, NASA requires that the Alternative Future Use Questionnaire be completed for all NASA projects. The purpose of this form is to determine the appropriate accounting treatment for each project (i.e. whether it will be treated as a Theme Asset project and capitalized, or as a Research and Development project and expensed) and for each individual acquisition of hardware, software or tools, if any, used in support of that project. The guidelines used in this form are required by Federal laws and regulations.

Individual acquisitions (purchase or fabrication) of hardware, software or tooling used in support of the project, if any, must be capitalized if all of the following three criteria are met:

- has, at this time, a planned future use for the hardware, software or tools on another project with a separate and distinct research objective (alternative future use);
- has a unit acquisition (purchase or fabrication) cost of more than \$100,000; and
- has a useful life of two or more years.

If a hardware item, software item or tool must be capitalized, then a WBS element within the project WBS structure must be established for that unique item.

Guided by the project's responses to this questionnaire, the Office of the Chief Financial Officer will make the final determination as to the proper accounting treatment for each project and individual acquisition of hardware, software or tools. The accounting treatment is applied through the entire life cycle.

This form is required to be completed for all projects at:

- the inception of the project; and
- any time during the course of the project that additional hardware, software or tools are planned.

PROJECT MANAGER INFORMATION

PROJECT NAME		LEAD CENTER		
PROJECT MANAGER OR DESIGNATE		PHONE NUMBER	PROJECT WBS CODE(S)	
START DATE OF PROJECT OPERATIONS	INITIAL LAUNCH DATE (if applicable)	DESTINATION ARRIVAL DATE (if applicable)	END DATE OF PROJECT OPERATIONS	END OF PROJECT DISPOSITION OF HARDWARE
ESTIMATED PROJECT COST (Phases A - D)				

1. Does the project itself meet any of the following definitions of research and development? If yes, check all boxes that apply.

☐ **Basic research:** Systematic study to gain knowledge or understanding of the fundamental aspects of phenomena and of observable facts without specific applications toward processes or products in mind;

☐ **Applied research:** Systematic study to gain knowledge or understanding necessary for determining the means by which a recognized and specific need may be met; and

☐ **Development:** Systematic use of the knowledge and understanding gained from research for the production of useful materials, devices, systems, or methods, including the design and development of prototypes and processes.

2. Consider the following questions for each planned individual acquisition of hardware, software or tools (e.g., specific parts by serial number or other unique identifier) throughout the life cycle of this project. Attach the detailed list of planned acquisitions to this document or send it electronically in the body of the e-mail.

a. Do any of these planned individual acquisitions of hardware, software, or tools (e.g., specific parts by serial number or other unique identifier) have a planned alternative future use on another project with a separate and distinct research objective? _____ YES

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b. Do any of these planned individual acquisitions of hardware, software, or tools (e.g., specific parts by serial number or other unique identifier) have a unit acquisition cost of \$100,000 or more? _____ YES

c. Do any of these planned individual acquisitions of hardware, software, or tools (e.g., specific parts by serial number or other unique identifier) have a useful life of 2 or more years? _____ YES

If the answers to **all three** questions for any individual acquisition of hardware, software, or tools are "Yes," complete the table below for that acquisition. Please note: For each acquisition a WBS element must be created within the project's WBS structure to track all of the costs related to the purchase or fabrication of that property. The project may determine where within WBS levels 2 to 7 to place the asset WBS element.

Property Description	Description of the Planned Alternative Future Use for that Property	WBS for That Individual Piece of Property	WBS Description

IF YOU WOULD LIKE TO INCLUDE ADDITIONAL COMMENTS OR INFORMATION RELATED TO THIS ACQUISITION, PLEASE USE THE AREA BELOW:

For questions related to this form, contact the property accounting branch at your center or the OCFO Property Branch at Headquarters on 202-358-4552.

Please submit completed questionnaires to: <mailto:hq-contractorproperty@nasa.gov>.

PROJECT MANAGEMENT (Name and signature)	DATE
PROPERTY ACCOUNTING (Name and signature)	DATE

SUPPORTING GUIDANCE FOR AFU QUESTIONNAIRE
Projects Under 7120.5D and 7120.X

Alternative Future Use

The costs of materials, equipment or facilities that are acquired or constructed for R&D activities and that have alternative future uses (in R&D projects or otherwise) shall be capitalized as tangible assets when acquired or constructed. An alternative future use requires that:

- At the time of the planned acquisition, there is a planned future use for the hardware, software, or tools on *another* project with a separate and distinct research objective.
- A future economic benefit can be identified and objectively measured at the time that the project (or acquisition) is acquired or constructed.

This could include ancillary or ground support equipment, for example, Interferometers, that would be utilized on more than one project.

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Attachment 15: continued

SECTION II - Projects Under 7120.7			
<p>As part of NASA's efforts to appropriately account for its assets and its expenses, NASA requires that the Capital Asset Identification Questionnaire be completed for all NASA infrastructure and institutional projects. The purpose of this form is to determine the appropriate accounting treatment for each individual asset acquired during the course of an infrastructure and institutional project.</p> <p>NASA Infrastructure and Institutional assets are capitalized as General PP&E if they meet both of the following criteria:</p> <ul style="list-style-type: none">• has a useful life of two or more years; and• has an acquisition cost of more than \$100,000. <p>If an individual asset meets these criteria, then it must be capitalized, <u>and a WBS element within the project WBS structure must be established for that unique item</u>.</p> <p>Guided by the project's responses to the questionnaire, the Office of the Chief Financial Officer will make the final determination as to the proper accounting treatment for each identified capital asset.</p> <p>This form is required to be completed for all projects at:</p> <ul style="list-style-type: none">• the inception of the project; and• any time during the course of the project that additional acquisitions are planned.			
PROJECT MANAGER INFORMATION			
PROJECT NAME		LEAD CENTER	
PROJECT PHYSICAL LOCATION		PROJECT MANAGER OR DESIGNATE	
PM PHONE NUMBER	PROJECT WBS CODE(S)	PROJECT COMPLETION DATE	
<p>The following two questions relate to the project itself:</p> <p>1. Does the project have an estimated useful life of 2 years or more?</p> <p><input type="checkbox"/> YES <input type="checkbox"/> NO</p> <p>2. Does the project have an estimated cost of \$100,000 or more?</p> <p><input type="checkbox"/> YES <input type="checkbox"/> NO</p> <p>3. Consider the following questions for each planned individual asset acquisitions throughout the life cycle of this project. Attach the detailed list of planned acquisitions to this document or send it electronically in the body of the e-mail.</p> <p>a. Do any of these planned individual asset acquisitions have a unit acquisition cost of \$100,000 or greater? <input type="checkbox"/> YES <input type="checkbox"/> NO</p> <p>b. Do any of these planned individual asset acquisitions of hardware, software or tools have an estimated useful of 2 or more years? <input type="checkbox"/> YES <input type="checkbox"/> NO</p> <p>If the answers to both questions for any individual acquisition are "Yes," complete the table below for that acquisition. Please note: For each acquisition a WBS element must be created within the project's WBS structure to track all of the costs related to the purchase or fabrication of that property. The project may determine where within WBS levels 2 to 7 to place the asset WBS element.</p>			

Property Description	WBS for That Individual Piece of Property	WBS Description	Estimated Cost of the Property	Estimated Completion / Acquisition Date for the Property
IF YOU WOULD LIKE TO INCLUDE ADDITIONAL COMMENTS OR INFORMATION RELATED TO THIS ACQUISITION, PLEASE USE THE AREA BELOW:				
<p>For questions related to this form, contact the property accounting branch at your center or the OCFO Property Branch at Headquarters on 202-358-4552.</p> <p>Please submit completed questionnaires to: mailto:hq-contractorpropert@nasa.gov.</p> <p>PROJECT MANAGEMENT (Name and signature) DATE</p> <p>PROPERTY ACCOUNTING (Name and signature) DATE</p>				
SUPPORTING GUIDANCE FOR AFU QUESTIONNAIRE				
Projects Under 7120.7				
<u>Property, Plant, and Equipment</u>				
<p>Property, plant, and equipment consists of tangible assets, including land, that meet the following criteria:</p> <ul style="list-style-type: none">• they have an estimated useful life of 2 years or more;• they are not intended for sale (presumed at NASA);• they have been acquired or constructed with the intention of being used, or being available for use by NASA (presumed at NASA); and• they have an acquisition value of \$100,000 or more. <p>The costs of materials, equipment, or facilities that are acquired or constructed in conjunction with the overall NASA project and that individually meet the capitalization criteria must be identified and tracked.</p>				

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CHANGE HISTORY LOG

Revision	Effective Date	Description of Changes
Baseline	08/05/2015	A new number was assigned since 270-WI-4200.0.1, Equipment Management expired. Extensive updates were made due to NASA Policy changes, which resulted in internal processes to be revised.

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